



“ Wine Opinions ”

# Oregon Wine Board Consumer Study Report

December 13, 2016

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# INTRODUCTION

Wine Opinions is a wine market research company focusing on the attitudes, behaviors, and taste preferences of the segment of U.S. wine drinkers who are the most frequent purchasers and consumers of wine. To this end, Wine Opinions maintains the largest online panel of highly involved wine consumers ever assembled, and a U.S. wine trade panel that includes wine producers, growers, importers, distributors, those who work on-premise and off-premise, members of the wine media, and others.\* Wine Opinions also undertakes custom research projects such as one-on-one interviews, on-

site interviews and evaluations, and other such qualitative and quantitative research as suits client project objectives.

The Oregon Wine Board engaged Wine Opinions to conduct a quantitative study to more finely understand who the core Oregon wine consumer is and what interests them about Oregon wine, as well as look at potential Oregon wine consumers and determine what barriers exist to increased consumption.

\*Like most online opt-in panels, the Wine Opinions panel of over 12,000 U.S. wine consumers is considered a “non-probability” panel.

In addition, by the nature of its recruiting and participation, the Wine Opinions panel is by design intended to represent two overlapping sub-segments among U.S. wine drinkers: (1) Frequent wine drinkers (on average drinking wine several times a week or more often), most of whom are highly involved with or influential on wine-shopping decisions, and (2) Wine consumers who purchase 750ml bottles of wine at retail costing over \$20 on a monthly or more frequent basis. The advantage of the Wine Opinions panel methodology is that it provides large sample sizes of these two key consumer groups, which have relatively low incidence in the U.S. adult population as a whole.

The targeted, non-probability nature of the panel means that survey results based on panel members should not be used to project or estimate the behaviors or

sentiments of the entire population of U.S. wine drinkers or even some segments of that population, without additional analysis or modeling to adjust for the panel focus.

Wine Opinions is furnishing these survey results and other research findings (the “results”) “as is” and does not provide any warranty of such results whatsoever, whether express, implied, or statutory, including, but not limited to, any warranty of merchantability or fitness for a particular purpose or any warranty that the results will be error-free. In this regard, the results do not constitute advice and Wine Opinions shall have no liability for the client’s use thereof. In no respect shall Wine Opinions incur any liability for any damages including, but not limited to, direct, indirect, special, or consequential damages arising out of, resulting from, or any way connected to the use of the results, whether or not based upon warranty, contract, tort, or otherwise; whether or not injury was sustained by persons or property or otherwise; and whether or not loss was sustained from, or arose out of, the results of, the survey, or any services that may be provided by Wine Opinions.

# OBJECTIVES & METHODOLOGY

The main goal of this study was to better understand the core Oregon wine consumer and what draws them to Oregon wine, as well as determine what keeps other U.S. wine consumers from becoming more ardent Oregon wine drinkers. The survey design built on findings from an earlier round of qualitative research, and it is recommended that the two rounds of research be considered together.

The specific goals of the survey were to assess the following:

- ✓ Consumption frequency by varietal and wine type, and (in comparison), consumption frequency by Oregon varietal and wine type.
- ✓ Activities enjoyed by high frequency and high end wine consumers, and the extent to which they differ for core Oregon consumers.
- ✓ Oregon state visitation and perceptions.
- ✓ The importance of various purchase decision factors when choosing a wine for a meal or a wine that costs over \$20.
- ✓ Familiarity with, consumption frequency and quality perceptions of wines from Oregon, Washington, key regions within each, and Napa Valley and Sonoma County.
- ✓ Circumstances under which consumers first tried Oregon wine.
- ✓ Level of experience with and interest in Oregon wine.
- ✓ Reasons that respondents haven't tried many Oregon wines, or that those who have tried them, don't drink Oregon wines more often.
- ✓ What regular Oregon wine drinkers think makes Oregon wine distinctive and what they like best about it.
- ✓ Characteristics strongly associated with Oregon wine vs. characteristics associated with Napa Valley and/or Sonoma County.

## Objectives and Methodology (*continued*)

This report focuses on the 532 respondents who drink wine more than once a week, AND buy wine costing \$20 or more at least monthly (referred to as high frequency, high-end - or HFHE - wine consumers throughout this report). Most survey respondents were drawn from the Wine Opinions consumer panel. Additional respondents were recruited online to ensure an adequate number of HFHE participants. Wine Opinions panelist respondents were sent an email invitation to the survey, with a link to the online survey embedded in the invitation (a copy of the survey questionnaire may be found at the end of this report). Completion of the survey entered all participants into a lottery for various cash rewards.

All questions were cross-tabulated by the following segments:

- ✓ Gender
- ✓ Age - Some age ranges did not net sufficient base sizes for comparison. For this reason, difference between those under 40, 40 – 49, 50 – 59, and 60+ have been compared.

- ✓ Oregon wine familiarity – based on question #11 in the survey, respondents were segmented by their level of engagement with Oregon wines:
  - Those who have tried few or no Oregon wines and know little about them. In the report, these are also referred to as “Unfamiliar.”
  - Those who have tried but have no further interest in Oregon wines, or who have not tried Oregon wines.
  - Those who have tried and liked Oregon wines, but don’t buy/drink them wines often. In the report, these are also referred to as “Somewhat Familiar.”
  - Respondents who are “very familiar” with Oregon wines and count them among their favorites. In the report these are also referred to as “Fans.”
  - Those who drink Oregon wine “regularly” but say they “are not an expert.” In the report these are referred to as “Users.”
  - In the report, when “Fans” and “Users” are combined the two groups together are referred to as “Core.”

## Objectives and Methodology (*continued*)

- ✓ Please note that throughout this report, when discussed collectively, respondents who are “very familiar with” and count Oregon wines among their favorites AND respondents who drink Oregon wine regularly but aren’t “experts” on them are referred to as “Core Oregon consumers.”
- ✓ Pinot Noir consumption – Those who drink Pinot Noir weekly vs. those who drink it monthly vs. all others.
- ✓ Oregon visitation – Those who have visited Oregon with the purpose of visiting wineries, and those who tried wines when they visited vs. all others.

Due to small base sizes for some segments, directional differences will be pointed out when notable.

Some questions were only asked of consumers with specific levels of familiarity with Oregon wines. This, as well as differences in question wording and scales used, may contribute to results that differ from 2015 findings.

Where statistically significant results are reported, these have been calculated at a confidence level of at least 90%.\* For the overall sample the confidence intervals ranged from approximately  $\pm 2.1\%$  -  $\pm 3.6\%$ .

\*Wine Opinions performs statistical significance tests on differences in respondent stated behavior or opinion, assuming a normal distribution around the response means. These tests are intended to highlight differences among the segments of the respondent sample and approximate a range of likely results among U.S. high frequency wine drinker respondents.

# CONCLUSIONS

- ✓ Activities that involve dining out, wine, travel, cooking and entertaining were valued by substantial majorities of respondents. Activity preference varied little by familiarity or consumption of Oregon wines or Pinot Noir.
- ✓ Wine was strongly associated with Oregon (the state) by 80% of respondents. There was extreme divergence in this measure between those Core Oregon consumers (96+% association), those who drank Oregon wines occasionally (84% association) and those who had tried few or no Oregon wines and were unfamiliar with it (45% association). Craft beer was associated with Oregon by 57%, and this too increased with Oregon wine familiarity. On the other hand, fresh fruit and produce and gourmet/artisanal cheese had relatively low association with Oregon, somewhat higher for Core Oregon wine consumers. Majorities associated Oregon with environmental aspects such as nature, clean air, outdoor activities and its coast; these associations were stable across Oregon wine segments.
- ✓ Choosing a wine to go with food is more about the situation than the wine - pleasing dining companions or guests and matching the wine with the occasion are the most important aspects.

Pairing the weight of the wine with the weight of the food is seen as more important than matching specific flavors. An easy-drinking wine is on average more valued than wines that are versatile with food or have “good crisp acidity.” However, frequent Pinot Noir drinkers and Oregon wine Fans rate the importance of acidity and matching food and wine flavors as well as the weight of the wine significantly higher, while rating “smooth and easy drinking on its own” lower.

- ✓ When choosing a wine over \$20, the complexity and nuances of flavor and the unique qualities of the region it's from are of greatest importance. Ease of pairing with food and aging potential were next most important, with critical scores, recommendations and small producers lagging them significantly. Organic grapes and sustainable practices were rated least important. Oregon wine Fans put even more emphasis on complexity and regionality, while elevating small family producers to the second tier of importance. Those with little exposure to Oregon wines place higher value on high scores and good reviews.

## Conclusions (*continued*)

- ✓ Core Oregon consumers (drink Oregon wine regularly, but are not experts; or consider Oregon among their favorite wines) are more involved wine drinkers than others. They drink wine more often and spend more on wine. Core Oregon consumers skew male and are comprised of a larger proportion of respondents in their 50s, than those with less experience or interest in Oregon wines. Respondents who have little experiences with Oregon wines skew female and younger (under 50).
- ✓ Core Oregon consumers typically are less partial to bolder red wines like Cabernet Sauvignon or Syrah, and more partial to Chardonnay and sparkling wine, Riesling, and Tempranillo than those with less interest in Oregon wines. The most avid Oregon wine drinkers (those who consider it a favorite, or “Fans”) drink Napa Valley wines less often than regular Oregon wine drinkers (who profess to not know much about Oregon wine), or Oregon wine triers (and like Oregon wine but don't drink it often).

## Role of Visibility & Distribution

- ✓ The less frequent consumers of Oregon wines (“Unfamiliar” and “Somewhat Familiar” from Q11) agreed in substantial numbers that they “don’t see many Oregon wines” where they shop and that Oregon wines are “rarely” displayed or recommended. A majority of those Unfamiliar agreed they would buy them more often if they knew which ones fit their taste, and one third of the “somewhat familiar” indicated problems choosing an Oregon wine because they weren’t familiar with them.
- ✓ These uncertainty barriers were significantly higher than those related to pricing or expense, varietal selection, flavor style or lack of critical acclaim.

## Conclusions *(continued)*

### Oregon Wine Fans:

*The survey question Q11 segmented the consumer sample by their familiarity and involvement with Oregon wine. Respondents assigned themselves to one of five segments. The following outlines the key differences between those segments.*

Q11 “Oregon wines are among my favorites, I am very familiar with many wineries and varieties from there.” This segment:

- ✓ Is significantly more “high end” even within HFHE consumers, with 66% of them buying \$30 - \$50 wines monthly or more often and 38% of them doing so with \$50+ wines.
- ✓ Skews male more than other segments, and are somewhat older, on par with Oregon “Users.”
- ✓ Drinks Pinot Noir, Chardonnay and sparkling wine more often than other segments, Cabernet Sauvignon and Syrah less often. They drink all Oregon varieties more often with the exception of Cabernet Sauvignon.
- ✓ Drinks Napa Valley wines somewhat less than regular or somewhat familiar Oregon consumers. They are significantly more likely to be “very

familiar” with all Oregon wine regions than even Oregon “Users” and purchase them far more frequently, although those who are familiar with and purchase regularly Southern Oregon, Columbia Gorge and Walla Walla are still a minority.

- ✓ Rates Willamette Valley quality highest, above Napa Valley and Sonoma County, and rates Oregon quality just behind Sonoma County. Their ratings for other Oregon regions are on par with Oregon “Users.”
- ✓ Is specifically more concerned about acidity when matching wine with food. They are much more enthusiastic about small artisan producers and complex nuanced flavor in their wines over \$20. They are significantly more likely to see terroir, old world/Burgundy style and balance as key differentiators for Oregon wines, compared to Regular Oregon drinkers, and more than twice as likely to cite ageability.
- ✓ Was significantly more likely to be introduced to Oregon wines through a visit or an Oregon-themed wine tasting.

## Conclusions (*continued*)

### Oregon Wine “Users:”

Q11 “I buy and drink Oregon wines regularly, although I am not an expert on them”

- ✓ Skew more male, but not as much as Oregon wine Fans, and older, similar to Oregon Wine Fans.
- ✓ Are less “high end” than Oregon wine Fans, and similar in their \$30+ purchasing to the “somewhat familiar” segment.
- ✓ Also have higher concern with acidity when matching with food, and are the most concerned that their dining companions will like the wine, but are otherwise similar to the “Somewhat Familiar” segment. They are similar to “somewhat familiar” segment in their priorities for \$20+ wines, except more concerned with food pairing.
- ✓ They drink Pinot Noir less frequently than Oregon wine Fans, but much more frequently than other segments, 50% of them drinking it weekly. Along with somewhat familiar segment, they drink Cabernet more often, while their Pinot Gris and Chardonnay consumption is middle of the segments.
- ✓ They are significantly less likely than Oregon Fans to say they are “very familiar” with Oregon wine regions or drink them regularly, but significantly more familiar and frequent than “somewhat familiar” occasional Oregon drinkers. The differences between them and “somewhat familiar” are dramatic for Willamette Valley, moderate for other Oregon regions.
- ✓ When saying what they like or makes Oregon different, they are significantly less likely to cite terroir, old world, small producers or acidity than Oregon wine Fans, and directionally more likely to talk about Pinot Noir or flavors. They were less likely than Oregon wine Fans to agree with most of the list of Oregon wine attributes, except for being distinctly different from Californian wines and receiving high scores or recommendations. They were similarly less likely than fans to choose Oregon over Napa or Sonoma for most traits, in particular ageability and complexity of flavor and food pairing.

## Conclusions *(continued)*

- ✓ Compared to Oregon Fans, they rated Oregon and Willamette Valley significantly lower in quality, but Willamette Valley was still on par with Napa and Sonoma. Their ratings for other Oregon regions were similar to Oregon wine Fans. All their Oregon ratings were significantly higher than “somewhat familiar” and “Unfamiliar” segments.

### Somewhat Familiar:

Q11 “I have tried and liked some Oregon wines but don't buy or drink them often”

- ✓ Are similar to Oregon “Users” purchasers in their buying frequency for \$30 and above. They are very close to the sample average in age and gender.
- ✓ Drink Pinot Noir and Riesling significantly less frequently than Core Oregon consumers (“Fans” plus “Users”). Like Oregon “Users,” they drink Cabernet more often than other segments. Pinot Noir is by far their most frequent Oregon purchase.
- ✓ They are similar to Oregon “Users” in their food pairing criteria, except less concerned with acidity. Their criteria for buying wines over \$20 are also similar.

- ✓ However, their familiarity with Oregon wines and sub regions is much lower than Oregon “Users,” with less than half as many claiming to be “very familiar” and one-fourth to one-fifth as many saying they drink them monthly or more often.
- ✓ They are significantly more likely to have first tried Oregon wines out of curiosity, or because they were served by the host; rather than any kind of promotional or educational setting.
- ✓ Half of them agree they don't see many Oregon wines in their stores, and one-third say they are rarely or never on display or recommended. One-third say they are unsure which Oregon wines to try, but small minorities cite cost or not having preferred varieties as a barrier to purchasing.
- ✓ Very few of them associate Oregon wines with ageability, critical acclaim, recommendations or complex flavors compared to Napa or Sonoma.
- ✓ They rate Willamette Valley and even more so Oregon quality significantly below Oregon “Users” and Fans, and rate Napa Valley even higher. Their ratings for other Oregon regions are moderately lower.

## Conclusions *(continued)*

### Tried but not interested segment

(very small sample): Although inconclusive due to a very small base size, not being to the respondent's taste is the top reason for disinterest in further purchase of Oregon wines. Other reasons mentioned included preference for wines of other regions, and lack of the varieties they prefer in Oregon.

### Unfamiliar:

Q11 “I have tried few or no Oregon wines and don't know much about them”

- ✓ Are moderately less frequent purchasers of wines \$30 and above than somewhat familiar or Oregon “Users.”
- ✓ This segment skewed significantly lower in age (36% under 40 vs. 16% - 24% for other segments), and was more likely to be female (54% vs. 25% - 35% for the other segments).
- ✓ Purchase nearly all varieties less frequently than other segments, except for Cabernet Sauvignon and Chardonnay.

- ✓ Are less concerned with food and wine pairing and details of the wine's flavors, and significantly more interested in the wine being smooth and drinkable. For wines above \$20, they are more concerned with good reviews and high scores, and less interested in regionality, small producers or complex flavor.
- ✓ Large majorities (80%+) are “very familiar” with Napa Valley or Sonoma County, and a significant minority (18%) are “very familiar” with Washington wines. Most drink Napa or Sonoma wines at least monthly.
- ✓ Over half say they don't see many Oregon wines in their stores and nearly half say they are rarely on display or recommended. However, 60% say they are unsure which to try while 44% say they would buy them more often if they knew which ones fit their taste. Expense, quality or lack of curiosity were only minor barriers.

## Conclusions (*continued*)

- ✓ Perceived quality among this group was much lower for all Oregon regions, compared to the other segments. Their ratings for Washington were also lower, while Sonoma County was roughly average and Napa Valley was rated highest by this segment.
- ✓ They were much less likely to have visited Oregon.

Pinot Noir and Oregon are inseparable, with strong correlations and interaction throughout the survey.

- ✓ Pinot Noir and interest in Oregon wine are profoundly intertwined; it's clear that Pinot Noir is a key entry point and ambassador for Oregon wine. Respondents that are the most avid Oregon wine drinkers are also more frequent Pinot Noir drinkers and vice versa.
- ✓ Pinot Noir drinkers behave similarly to Core Oregon consumers when choosing a wine with a meal and when choosing a more expensive wine.
- ✓ Over half of weekly/monthly Pinot Noir drinkers are Core Oregon consumers (drink regularly or consider them a favorite). Nearly two-thirds

(64%) of weekly Pinot Noir drinkers are Core Oregon consumers.

- ✓ In contrast, just 9% of those who consume Pinot Noir less often than monthly also consume Oregon wines monthly or more often.
- ✓ Weekly Pinot Noir consumption is also associated with significantly higher familiarity with, and consumption of Willamette Valley, Southern Oregon and Columbia Gorge, although not Walla Walla.
- ✓ Half of those who visited Oregon with a mission to visit wineries or with intent to try Oregon wines consider Oregon wines among their favorites. A further 28% of them drink Oregon wines regularly. They are more likely to have positive perceptions of Oregon wine, rate Oregon wine quality much higher, and drink Oregon varietals more frequently than other respondents (with the exception of Cabernet Sauvignon).
- ✓ Consistent among Core Oregon consumers, Pinot Noir drinkers, and Oregon wine-interested visitors is their more frequent consumption of wine, and their more frequent purchase of \$30+ wines.

## Conclusions *(continued)*

- ✓ Comparing familiarity with Willamette Valley wine and Oregon wine showed higher "very familiar/have tried many" rates and higher unfamiliar rates for Willamette Valley wines than for Oregon wine, but at the same time, lower "have tried but don't know well" rates.
- ✓ Core Oregon consumers were more likely to seek out Oregon wines, while the rate of introduction due to selection by a host was higher among respondents who had tried and like Oregon wine but don't buy them often.
- ✓ The biggest barrier to increased Oregon wine consumption and purchase among those with little experience with Oregon wines, or those who like Oregon wine but don't buy it often, is a lack of familiarity with Oregon wines and exposure to Oregon wine, rather than a bad experience, the influence of bad reviews, wine style or lack of preferred varieties produced, or perceptions of high Oregon wine prices. These respondents frequently cited not knowing what Oregon wines to choose and not seeing them where they shop.
- ✓ Although Oregon is much more highly associated with sustainable and organic practices when compared to Napa Valley and Sonoma County, these are not traits that are associated with Oregon when assessed on its own, and are not traits particularly important when respondents choose \$20+ wines.

# CONSUMER RESPONDENT PROFILE

## Gender

- ✓ The high frequency wine consumer, high-end wine buyer respondent pool was approximately two-thirds male and one-third female (63% male/37% female).
- ✓ Oregon wine Fans skewed more male (75%) while those unfamiliar with Oregon wines skewed female (54%).

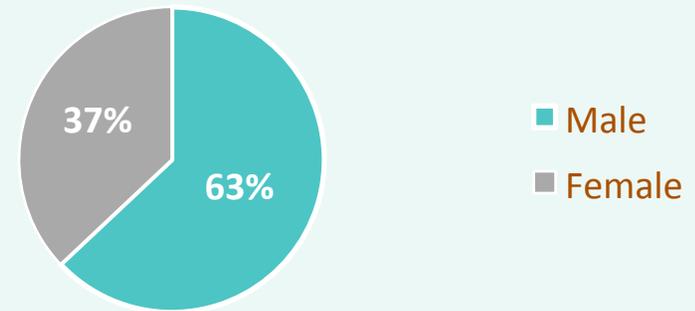
## Age

- ✓ On average, respondents were 49 years old, with those in their 40s and 50s most represented (28% and 27% respectively).
- ✓ Older consumers (50+) formed a higher proportion of Core Oregon consumers (56% vs. 30% to 44% for other segments). Younger consumers (under 40) were a higher proportion of those who had tried few or no Oregon wines (36% vs. 17% - 24% for the other segments).

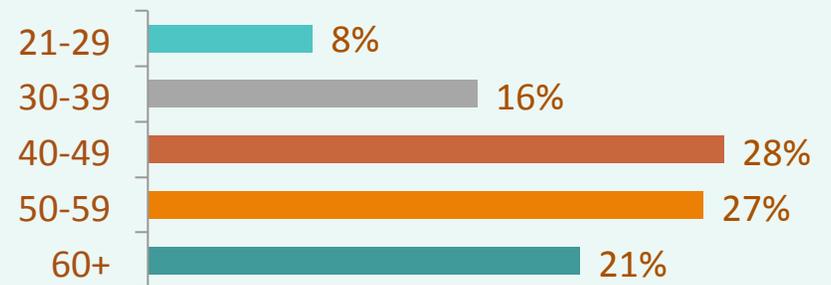
## Geography

- ✓ California was the most represented state (21%), followed by New York and Texas (6% each), and New Jersey (5%).

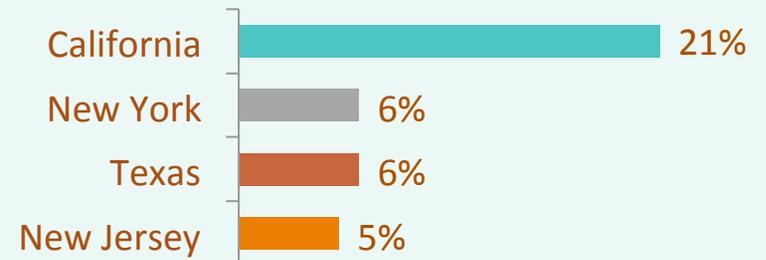
Consumer Respondents by Gender



Consumer Respondents by Age Range



Top States Represented



## Wine Consumption and Purchase Frequency

All respondents were high frequency wine drinkers (drink wine at least a few times a week), AND high-end wine buyers (buy \$20+ wine weekly or monthly).

- ✓ Over half consume wine a few times a week (58%), and less than half everyday (42%).
- ✓ All buy over \$20 wine at least monthly.
- ✓ Under \$20 wines are purchased weekly by the largest contingent of these respondents (40% - 43%).
- ✓ Most buy \$20 - \$29.99 wine on a monthly basis (74%).
- ✓ The majority buy \$30 - \$49.99 wine either monthly (35%) or several times a year (41%), and \$50+ wine several times a year (29%) or less often (37%).

### Wine Consumption Frequency



### Retail Wine Purchase Frequency by Price Category

	WEEKLY	MONTHLY	SEVERAL TIMES A YEAR	LESS OFTEN	NEVER
Under \$14	40%	20%	11%	19%	10%
\$14 - \$19.99	43%	36%	10%	8%	3%
\$20 - \$29.99	19%	74%	4%	2%	1%
\$30 - \$49.99	8%	35%	41%	14%	3%
\$50 or more	5%	18%	29%	37%	11%

## Segment Findings

- ✓ Weekly Pinot Noir drinkers, Core Oregon consumers, and respondents who visit Oregon to visit wineries or taste the wines are more likely to be weekly/monthly \$30+ wine buyers than their respective counterparts. Oregon wine Fans purchase high-priced wine significantly more often than other segments.
- ✓ In addition, these respondents – Pinot Noir drinkers, Core Oregon consumers, and Oregon wine-interested visitors – drink wine more frequently than others.

**Weekly/Monthly Purchases of \$20+ Wine by Oregon Wine Familiarity**

	SOMEWHAT FAMILIAR WITH OREGON	OREGON WINE "USERS"	OREGON WINE FANS
\$20-29.99	91%	94%	92%
\$30-49.99	38%	37%	66%
\$50+	23%	18%	38%

## Activities of Interest

- ✓ Activities that involve dining out, wine, and travel were reported as being most enjoyed by 80% or more of respondents.
- ✓ A majority enjoy cooking and entertaining (70% and 64% respectively).
- ✓ Physically active pursuits were minority interests.

## Segment Findings

- ✓ Respondents who consider Oregon wines among their favorite wines were the most interested in visiting wine regions and attending wine and food events, compared to other respondents.
- ✓ Respondents least familiar and interested in Oregon wine were significantly more interested in going on cruises than were respondents with more interest in Oregon wines.
- ✓ Other than a slightly higher interest in visiting wine regions, there were minimal differences between Oregon wine Fans and "Users" or occasional Oregon wine consumers.

## Activities Most Enjoy

Dining out at new restaurants	86%
Visiting wine regions	84%
Traveling to new places	81%
Attending wine and food events/festivals	80%
Trying new recipes	70%
Entertaining/hosting dinner parties	64%
Going to the theater or symphony	46%
Hiking	44%
Going to art galleries or museums	43%
Bicycling	27%
Going on cruises	23%
Golfing	22%

# OREGON STATE

- ✓ "Wine" comes to mind most often when these high frequency, high-end wine respondents think of the state of Oregon (82%).
  - The outdoors (nature, clean air), climate (wet) and physical features (coast) are associated with Oregon by a majority.
  - Craft beer is strongly associated with Oregon by over half of respondents (57%)
  - Restaurants and farmers markets are associated with Oregon by a significant minority, and all other food related associations by one-third of respondents or less.

## Segment Findings

- ✓ Oregon wine **Fans** associated all of these words and phrases with Oregon at moderately higher rates, BUT nature and the outdoors, and to a lesser extent, rainy climate, were associated with Oregon fairly consistently across Oregon familiarity-based consumer segments.

## Words/Phrases Associated with the State of Oregon

Wine	82%
Nature	70%
Rain, wet climate	66%
Outdoor activities	64%
Clean air, environment	60%
Coast	59%
Craft beer/breweries	57%
Lively food and restaurant scene	48%
Farmers markets	44%
Dramatic landscapes	41%
Independent craftspeople	37%
Bookstores and cafes	33%
Seafood	33%
Fresh fruit and produce	27%
Gourmet and artisanal cheese	25%
Pioneers	17%
Innovation	12%

## Oregon State *(continued)*

- ✓ Just over one-quarter of respondents had visited Oregon in the past three years (28%).
  - For the majority of Oregon visitors, wine was either the primary purpose of the trip (10% of total respondents, 34% of visitors), or they made a point to try Oregon wines (13% of total respondents, 46% of visitors).
- ✓ Half of those who visited Oregon with the intent to visit wineries or with intent to try Oregon wines now consider Oregon wines are Oregon Fans (50% vs. 8% of others). These respondents are more likely to associate Oregon with positive attributes.
- ✓ Weekly Pinot Noir drinkers are twice as likely as others to have visited Oregon with a primary purpose to visit wineries.
- ✓ Familiarity and consumption with Oregon and Washington wines (and those from their wine regions) was higher among the Oregon wine-interested visitors. These respondents are more frequent consumers of all Oregon varietals except Cabernet Sauvignon.

### Wine Tasting Experience During Past Three Year Oregon Visit

Visiting Oregon wineries was the primary purpose of the trip	10%
Visited Oregon, made a point to try Oregon wines while there	13%
Visited Oregon, did not pay close attention to wine while there	6%
Have not visited Oregon in the past three years	72%

# WINE CONSUMPTION AND PURCHASE BEHAVIOR

- ✓ Cabernet Sauvignon is the red wine respondents drink most often (nearly half do so weekly – 49%), but Pinot Noir is not far behind, with more than one-third reporting they consume it weekly (37%).
  - Syrah is the third most often consumed, followed by Chardonnay and Sparkling wine.
  - Although Tempranillo is consumed by a significant minority, it lags Syrah.
  - Pinot Gris is more popular than Riesling, but these wine are purchased primarily less often than monthly.
  - It is worth noting that Chardonnay moves substantially ahead of Syrah and the gap between Cabernet and Pinot Noir increases when high frequency but not high end consumers are measured.

**Consumption Frequency by Varietal or Wine Type**

	WEEKLY	MONTHLY	SEVERAL TIMES A YEAR	LESS OFTEN	NEVER
Cabernet Sauvignon	49%	34%	11%	4%	2%
Pinot Noir	37%	29%	19%	10%	5%
Syrah	19%	37%	24%	12%	8%
Chardonnay	17%	27%	23%	18%	14%
Sparkling	12%	23%	28%	25%	12%
Tempranillo	10%	32%	26%	17%	16%
Pinot Gris or Pinot Grigio	9%	20%	26%	28%	17%
Riesling	7%	19%	27%	25%	23%

## Wine Consumption and Purchase Behavior (*continued*)

### Segment Findings

- ✓ Respondents who have at least tried Oregon wine (and liked it), drink Pinot Noir more often than other respondents. Core Oregon wine consumers are twice as likely to be weekly Pinot Noir drinkers, with 62% of Oregon wine Fans drinking it weekly and 50% of Oregon Users (vs. 18% - 27% of other segments).
  - Core Oregon consumers drink Riesling and Tempranillo more often than other respondents.
  - Oregon wine Fans differed from Oregon wine Users and those who have tried and liked it, in that they drink Chardonnay and sparkling wine more often, and Cabernet Sauvignon and Syrah less often, than other segments.
- ✓ Weekly/Monthly consumption of Chardonnay, Riesling, Cabernet Sauvignon, and Syrah skewed male. Women are more frequent Pinot Grigio/Pinot Gris consumers.
- ✓ Respondents in their 50s drink Cabernet Sauvignon significantly more frequently than all other respondents. Those under 40 are the most frequent sparkling wine consumers.

## Wine Consumption and Purchase Behavior *(continued)*

- ✓ When choosing wine to go with a meal, knowing their dining companions will like it (mean rating of 5.7), followed by balancing the weight of the wine and food (5.5), and matching wine with the occasion (5.4) are the most important considerations.
  - These aspects are more important than

pairing specific flavors in the wine and food (5.3), or being easy drinking on its own (5.2).

- Being versatile when it comes to pairing well with many foods (4.9), trumps a wine with good, crisp acidity (4.6).
- Least important is the reputation of the region (4.5).

### Importance of Attributes when Choosing a Wine for a Meal

	1 = NOT AT ALL IMPORTNT	(2)	(3)	(4)	(5)	(6)	7 = EXTREMELY IMPORTANT	MEAN
I know my guests/dining companions will like it	2%	2%	3%	9%	21%	35%	30%	5.7
Balancing the weight of the wine and the food	2%	3%	3%	10%	25%	29%	28%	5.5
Matching the wine and occasion	3%	4%	4%	12%	19%	31%	27%	5.4
Matching specific wine and food flavors	2%	3%	5%	15%	22%	31%	22%	5.3
The wine is smooth and easy drinking on its own	2%	5%	7%	17%	24%	24%	22%	5.2
Versatile and goes with many foods	3%	4%	6%	21%	28%	26%	12%	4.9
The wine has a good, crisp acidity	2%	6%	10%	30%	25%	18%	9%	4.6
I am already familiar with this type of wine	7%	9%	7%	17%	27%	23%	12%	4.6
The wine comes from a region with a great reputation	4%	10%	15%	16%	22%	20%	12%	4.5

## Wine Consumption and Purchase Behavior *(continued)*

- ✓ The most important attribute when choosing an over \$20 wine is a complex or nuanced flavor (mean rating of 4.2), followed by the unique qualities a region can offer (3.9).
  - Second tier attributes are pairing versatility (3.6) and ageability (3.5). These attributes were rated slightly more important than good scores and ratings, or being made by a small

artisan/family producer (3.3). Professional recommendations are less important than these characteristics (3.1).

- Least important are that it was produced in a way that was sustainably farmed or environmentally friendly (2.6), or made with organically grown grapes (2.5).

<b>Importance of Attributes when Choosing a Wine Over \$20</b>	1 = NOT VERY IMPORTNT	(2)	(3)	(4)	5 = EXTREMELY IMPORTANT	MEAN
Has complex or nuanced flavors	<.5%	2%	12%	49%	36%	4.2
Has the unique qualities of a region where it's made	2%	5%	21%	47%	26%	3.9
Is easy to pair with a variety of foods	4%	6%	31%	44%	15%	3.6
Has good aging potential/is worth cellaring	5%	11%	28%	40%	16%	3.5
Receives high scores or good reviews from critics	8%	11%	33%	37%	11%	3.3
Made by a small artisan producer or family winery	6%	14%	39%	30%	12%	3.3
Recommended by store or restaurant staff	10%	15%	36%	31%	8%	3.1
Sustainably farmed, environmentally friendly	22%	24%	30%	19%	5%	2.6
Made with organically grown grapes	28%	22%	32%	14%	5%	2.5

## Wine Consumption and Purchase Behavior *(continued)*

### Segment Findings

- ✓ When pairing wines with a meal, good acidity and balancing the weight were significantly more important to Oregon wine Fans (means of 5.2 and 5.9). Smooth and easy drinking was significantly more important for those unfamiliar with Oregon wines (5.9 mean). Core Oregon consumers were directionally more concerned with matching specific flavors of the wine and food.
- ✓ When choosing a \$20+ wine, Oregon wine Fans rated small artisan producers (3.6) and complex nuanced flavor (4.4) significantly higher than other respondents, while high scores and good reviews are more important to those less experienced with Oregon wines. Those unfamiliar with Oregon wines rated unique regional qualities lower.
- ✓ When choosing a wine to pair with a meal, monthly+ Pinot Noir drinkers are more likely than others to match specific flavors and weight of the wine and food; and look for a wine that has a good, crisp acidity.

Respondents who drink Pinot Noir less often or not at all were significantly more likely to look for a wine that is smooth and easy drinking on its own. When choosing a \$20+ wine, the monthly+ Pinot Noir drinkers find organic grapes and sustainability or environmentally friendliness more important, as well as expression of terroir.

# OREGON AND COMPETITIVE REGIONS

- ✓ Oregon and Washington are on par in terms of respondent trial and familiarity. Just under half consider themselves very familiar with the wines of these regions (49% and 47%) and close to nine in ten respondents have at least tried them (88% and 89%).
- Slightly more respondents consider themselves very familiar with Willamette Valley wines (53%) than Oregon wines (49%). However, more respondents have tried or are aware of Oregon wines.
- Respondents are more familiar with wines from Walla Walla Valley, than with Columbia Gorge and Southern Oregon.
- ✓ Familiarity with Napa Valley and Sonoma County wine is universal (99% and 98%).

<b>Wine Region Familiarity</b>			
	VERY FAMILIAR WITH THIS REGION'S WINES AND HAVE TRIED MANY	HAVE TRIED WINES FROM THIS REGION BUT DON'T KNOW THEM VERY WELL	KNOW LITTLE OR NOTHING ABOUT THESE WINES
Napa Valley	89%	10%	1%
Sonoma County	86%	12%	2%
Willamette Valley	53%	27%	20%
Oregon	49%	39%	12%
Washington	47%	42%	11%
Walla Walla Valley	35%	37%	28%
Columbia Gorge	19%	45%	36%
Southern Oregon	13%	48%	39%

## Oregon and Competitive Regions (continued)

### Segment Findings

- ✓ Core Oregon consumers are more familiar with all regions but Napa Valley, which had consistently high familiarity across segments.
- ✓ Those 50 and older and male respondents were more familiar than their respective counterparts with all but the least known regions of Southern Oregon, Columbia Gorge, and Walla Walla Valley, for which familiarity was generally low.
- ✓ Only 73% of Oregon "Users" claim to be "very familiar" with Willamette Valley. Their numbers for Southern Oregon and Columbia Gorge are also low, at 15% and 22%. Even among Oregon fans, those "very familiar" with Southern Oregon and Columbia Gorge are only 39% and 43%.

## Oregon and Competitive Regions (continued)

- ✓ In terms of frequency of consumption, Washington has only a slight, but insignificant, advantage over Oregon, (33% drink it at least monthly vs. 31%).
- Again, consumption rates of Willamette Valley wine is comparable to those of Oregon and Washington (32% at least monthly), but more respondents are likely to never drink it (20% vs. 12% for Oregon and 10% of Washington).
- The majority drink wine from the Walla Walla Valley, Columbia Gorge, and Southern Oregon infrequently (less often than every 2 – 3 months) or never.

	WEEKLY	MONTHLY	EVERY 2 – 3 MONTHS	LESS THAN EVERY 2 – 3 MONTHS	NEVER
Napa Valley	43%	36%	12%	8%	2%
Sonoma County	41%	37%	11%	8%	3%
Washington	10%	23%	29%	28%	10%
Oregon	7%	24%	31%	26%	12%
Willamette Valley	7%	25%	27%	22%	20%
Walla Walla Valley	5%	13%	17%	38%	27%
Southern Oregon	3%	6%	14%	39%	38%
Columbia Gorge	3%	6%	15%	40%	35%

## Oregon and Competitive Regions (continued)

### Segment Findings

- ✓ Core Oregon consumers drink wines from all of these regions more often than other respondents except for Sonoma County (consistent) and Napa Valley (Oregon wine Fans drink it less often than Oregon wine "users" or those only somewhat familiar with Oregon wine).
- ✓ The only wines that men drink weekly or monthly at higher rates than women are Willamette Valley and Sonoma County wine (Sonoma consumption also skews slightly older).
- ✓ Weekly/Monthly Pinot Noir drinkers are more familiar with wines from Oregon and are more frequent consumers of Oregon wines. However, while weekly Pinot Noir drinkers are more familiar with Oregon's sub-regions, monthly Pinot Noir drinkers are not, except for Willamette Valley.

Regular Pinot Noir consumption strongly correlates with frequency of drinking Oregon wines:

- ✓ Weekly Pinot Noir drinkers are the most avid Oregon wine drinkers, with 52% of them drinking Oregon wines at least monthly, 51% drinking Willamette Valley at that rate, 16% for Southern Oregon, 15% for and Columbia Gorge, and 21% for Walla Walla Valley.
- ✓ Monthly Pinot Noir drinkers were also more frequent consumers of Oregon wine, albeit at about 3/5 the rate of weeklies.
- ✓ Few of those who consume Pinot Noir less often than monthly consume Oregon wines monthly or more often.

## Oregon and Competitive Regions (continued)

### Segment Findings

The Q11 segments differ dramatically in their frequency of drinking Oregon wine.

- ✓ Over one-fourth of those who call it a favorite (Oregon wine Fans) drink it weekly and three-fourths of them at least monthly.
- ✓ Among Oregon "Users," only 7% drink it weekly and slightly more than half at least monthly.
- ✓ Both above segments drink Napa and Sonoma wine frequently. However, Oregon "Users" drink Napa and Sonoma far more often than Oregon (43% - 46% weekly, over 80% monthly+). The Oregon Fans drink Oregon nearly as much Napa and Sonoma.
- ✓ Weekly consumption of Oregon wine is minimal among respondents only somewhat familiar with Oregon wine. Even monthly drinking of Oregon or Willamette Valley wines ranges just 8% - 13% in this segment.

### Weekly Consumption by Oregon Wine Familiarity

	SOMEWHAT FAMILIAR WITH OREGON	OREGON WINE "USERS"	OREGON WINE FANS
Oregon	1%	7%	28%
Willamette Valley	1%	7%	28%
Southern Oregon	1%	4%	6%
Columbia Gorge	1%	5%	8%
Walla Walla	2%	7%	15%

# OREGON WINE FAMILIARITY

Respondents were asked the circumstances of the first time they tried Oregon wine. 17% skipped this question because they had not tried Oregon wine. The average respondent checked two circumstances.

- ✓ There was no majority answer to this question among those who had tried Oregon wine, but nearly half (48%) first tried Oregon wine because they they had heard Oregon makes great Pinot Noir.
  - One-third were just curious (33%).
  - Between 13% and 19% tried it because it was recommended by a friend, critic or magazine, or by retail or on-premise staff.
  - Just over one-fifth were exposed to Oregon wine at a tasting or festival (22%)

## Segment Findings

- ✓ Respondents who are Oregon Fans were more likely than others to first try Oregon wine during a winery visit (34% vs. 7% - 13%) or at an Oregon themed tasting (20% vs. 8% - 9%).

- ✓ Curiosity, friend’s recommendation and generic tastings or festivals were not correlated with being an Oregon Fan or more frequent consumption of Oregon wine.
- ✓ Those somewhat familiar with Oregon were more apt than more frequent Oregon wine drinkers to have first tried it because it was selected by their host. (17% vs. 8% - 10%).

### Reason First Tried Oregon Wine

I heard they make great Pinot Noir	48%
I was just curious	33%
A friend recommended I try it	24%
It was being poured at a wine tasting or festival	22%
It had been recommended by a wine critic or magazine	19%
It was recommended by retailer	16%
I was visiting wineries in Oregon	15%
It was recommended by a sommelier or the restaurant wait staff	13%
It was selected by the host	12%
I attended an Oregon themed wine tasting	10%
I can't recall or some other reason	9%

## Oregon Wine Familiarity (*continued*)

A more detailed question was asked about respondent familiarity with Oregon wine, in order to more finely distinguish between those who were somewhat familiar or occasional buyers, those who purchased regularly, and those who were very familiar and true fans. This segmentation showed that:

- ✓ The majority had tried Oregon wine. Only 15% had not tried Oregon wine or had tried a few but didn't know much about it (i.e., unfamiliar with Oregon wines). Very few had tried Oregon wine but had no interest in repurchase (4%).
- ✓ Among Oregon wine triers, more consider themselves Core Oregon wine drinkers (44% of total respondents, i.e., drink regularly or consider among favorite wines) than reported buying them infrequently (37% of total respondents, i.e., somewhat familiar).
  - The respondents who drink Oregon wines regularly fall into two camps, those who don't consider themselves an expert on them (27% of total respondents, i.e., Oregon wine "Users"), and those who consider Oregon wines among their favorite wines and are very familiar with them (17% of total respondents, i.e., Oregon wine Fans).

### Oregon Wine Familiarity

I have tried few or no Oregon wines and don't know much about them	15%
I have tried some Oregon wines and don't have much interest in trying them again	4%
I have tried and liked some Oregon wines but don't buy or drink them often	37%
I buy and drink Oregon wines regularly, although I am not an expert on them	27%
Oregon wines are among my favorites, I am very familiar with many wineries and varieties from there	17%

## Oregon Wine Familiarity (*continued*)

### Segment Findings

- ✓ Respondents under 40 were more likely than those older, and women more likely than men, to have never tried or only have tried a few Oregon wines.
- ✓ Regular purchase, but lower expertise regarding Oregon wines, was highest among those in their 50s.
- ✓ Men were more apt than women to consider Oregon wines among their favorites.
- ✓ Weekly Pinot Noir consumption was strongly correlated with core level Oregon wine consumption. Nearly half of those who drink Pinot Noir several times a year or less were somewhat familiar with Oregon wines, and one-fourth were unfamiliar with them.

## Oregon Wine Familiarity (*continued*)

Those who stated they had either only tried a few Oregon wines or none at all (n= 71), and were unfamiliar with Oregon wine were asked if they agreed with a series of statements about Oregon wine. It was found that:

- ✓ Low or no trial is likely due to a lack of familiarity with Oregon wine (don't know what to select - (60%), or a lack of visibility (don't see Oregon wines where they shop – 53%).
  - In addition, 43% of this group stated they don't see it on display where they shop.
- ✓ A significant minority would drink more Oregon wine if they knew which ones fit their taste preferences (44%).
- ✓ Only a few don't drink more Oregon wine due to a disinterest in trying new wines or a dislike of the Oregon wines they have tried, a lack of positive reviews, or price.

### Reasons Don't Drink Oregon Wine

(Base = have tried few/no Oregon wines, don't know much about them, i.e., "somewhat familiar")

I am not familiar with many Oregon wineries, so I am not sure which to select	60%
I don't see many Oregon wines where I shop for wine	53%
I would buy them more often if I knew which ones fit my taste preference	44%
Wines from Oregon are rarely or never on display or recommended where I shop	43%
I prefer to stick with wines I already know	16%
Oregon doesn't make the varieties of wine I like best	10%
I have not been impressed by the Oregon wines I have tried	7%
I seldom see good reviews or high critics' scores on wines from Oregon	6%
I am reluctant to try new wines from Oregon because they are expensive	4%

## Oregon Wine Familiarity (*continued*)

Among those who have tried Oregon wines, but are not interested in trying them again (n=18):

- ✓ Half (9 respondents) tried them and did not like them.
  - Four respondents think Oregon wines are too inconsistent
- ✓ For one-third (6 respondents), Oregon doesn't produce varieties or types of wine they like.
  - Although four like the wine Oregon produces, they think they are better made elsewhere.
- ✓ Only one of these respondents think Oregon wine is too expensive.
- ✓ Other responses (n = 3) included a preference for heavier reds, a preference for old world wines, and one who thinks there's "not enough heat" in Oregon, but believes Southern Oregon Cabernet Sauvignons are "ok."

### Reasons for Little/No Interest in Oregon Wine (Base = have tried few/no Oregon wines, not much interest in trying them again)\*

I have tried them and they are not to my taste	50%
Oregon doesn't produce the varieties or types of wine I like	33%
They are too inconsistent - I never know if I am going to like it or not	22%
I like the varieties Oregon produces, but think they are better made in other wine regions	22%
The wines are too expensive	6%
Other	17%

\*Caution small base size, (n = 18)

## Oregon Wine Familiarity (*continued*)

A somewhat different list of statements was given to those who have tried and like Oregon wine but don't buy or drink them often, revealing:

- ✓ Half don't see many Oregon wines where they shop (50%).
  - One-third don't see it on display or it is not recommended to them where they shop (34%).
- ✓ A lack of familiarity may account for why one-third don't buy Oregon wine more often – they are unsure of which to choose (33%).
- ✓ About one-quarter don't drink more Oregon wine because they prefer bigger, bolder wines (23%).
- ✓ The perception that Oregon wines are expensive is a barrier for only 12%.
- ✓ Less than one in ten of these respondents shy away from Oregon wines due to a disinterest in trying new wines, a lack of awareness of positive reviews, or a dislike of the Oregon wines they have tried.

- ✓ Weekly Pinot Noir drinkers in this segment were more likely to indicate they don't see many Oregon wines or displays where they shop. Those who don't drink Pinot Noir regularly were more likely to agree Oregon doesn't make their preferred varieties or they prefer bigger, bolder wines, but they still summed to no more than those who said they didn't see many Oregon wines.

### Reasons Don't Drink/Buy Oregon Wine More Often (Base = have tried/like Oregon wine, but don't buy/drink often, i.e., "somewhat familiar")

Don't see many Oregon wines where I shop	50%
I am not familiar with many Oregon wines, so I am not sure which to select	33%
Wines from Oregon are rarely or never on display or recommended where I shop	34%
I prefer bigger, bolder wines than the kinds made in Oregon	23%
Oregon doesn't make varieties of wine I like best	16%
I am reluctant to try new wines from Oregon because they are expensive	12%
I prefer to stick with wines I already know	9%
I have not been impressed by the Oregon wines I have tried	9%
I seldom see good reviews or high critics scores on wines from Oregon	5%

# OREGON WINE DRINKER PERCEPTIONS OF OREGON WINE

Respondents who drink Oregon wine regularly or consider it among their favorites were asked on an open-ended basis what they think differentiates Oregon wine. Answers were coded for common themes, and are summarized in the adjacent table.

- ✓ Although a minority opinion, Pinot Noir is what they most often believe differentiates Oregon wine from that of other regions (23%). A distinct terroir was the next most often mentioned distinction (19%).
- ✓ Oregon's old world style was a theme for 11%, or more specifically its similarity to Burgundian wine.
- ✓ Among differentiating factors mentioned by less than 10% were a lighter style, cooler climate, balance and complexity, earthiness, and food friendliness.
- ✓ Less than 5% cited acidity levels, small/artisanal producers; good Pinot Gris, and a fruit forward style as distinctive Oregon characteristics.

## What Makes Oregon Wine Different - Top Responses\*

(Base = buy/drink Oregon wine regularly; among favorite wines, i.e., core Oregon wine drinkers )

Pinot Noir/great Pinot Noir	23%
Terroir/distinct terroir/product of terroir/distinct regional flavor	19%
More old world style/Burgundy style/bridge between old and new world/similar regional characteristics to Burgundy	11%
Lighter style/wines	8%
Climate (general)	6%
Earthy/earthier style/flavor	6%
Cooler climate	6%
Balanced/not overpowering/great balance	6%
Complex/more complex	6%
Very food friendly wines	5%
Great taste/flavor (general)	5%
Distinct flavor profile/taste	4%
Greater acidity/more acidity/unique acidity characteristics	4%
Quality/high quality	4%
Many small/boutique/artisanal producers	4%
Pinot Gris/great Pinot Gris	4%
Fruit forward/fruit driven wines	4%

\*Open-ended question; 199 respondents offered a comment.

## Oregon Wine Drinker Perceptions of Oregon Wine *(continued)*

Respondents who drink Oregon wine regularly or consider them among their favorites were also asked what they liked best about Oregon wine.

- ✓ Pinot Noir is also what regular respondents like best about Oregon wine (24%).
  - Only 4% like Oregon wine best based on its Pinot Gris.
- ✓ They also like that it is high in quality (13%) and value (9%).
- ✓ Among the aspects of Oregon wine regular drinkers like best, but were mentioned by fewer than one in ten, were reasonable prices, old world/Burgundian style, and the variety of wines produced.
- ✓ 5% or less like Oregon wine best due to stylistic characteristic such as lightness, fruitiness, refinement, balance, earthiness, or sense of place/terroir.
- ✓ Only 4% mentioned they like Oregon wine best because it is food friendly.

### What Like Best About Oregon Wine - Top Responses\* (Base = buy/drink Oregon wine regularly or among favorite wines, i.e., core Oregon wine drinkers)

Pinot Noir (general)/excellent/amazing Pinot Noir/Willamette Valley Pinot Noir	24%
Quality/excellent/good quality	13%
Excellent/good value/good QPR	9%
Complexity/complex flavors	8%
Reasonable prices/affordable	8%
Burgundian/old world style/characteristics	7%
Variety	6%
Taste/flavor/flavorful	5%
Lighter style	5%
Fruitiness	5%
Elegant/refined/delicate/restrained	5%
Distinctive/unique	5%
Innovative/creative winemaking/winemaking culture	5%
Full flavored/bodied/rich	4%
Pinot Gris/excellent Pinot Gris	4%
Pairs well with foods	4%
Earthiness	4%
Sense of place/distinct sense of place/terroir	4%
Balanced/well balanced	4%

\*Open-ended question; 195 respondents offered a comment.

## Oregon Wine Drinker Perceptions of Oregon Wine *(continued)*

Those who had at least tried and like Oregon wine were asked if they associated any of a list of attributes with Oregon wines.

- ✓ The traits these respondents most strongly associate with Oregon wine, wineries, and wine country are cool climate (66%), small artisan or family producers (61%), and that the wines are distinctly different from California wines (61%).
  - Second tier trait associations (strongly associated by a significant minority) included complex or nuanced flavors, food friendliness, and that the wines are more like Burgundy than California.
  - The association with sustainably farmed, environmentally friendly production was associated with Oregon wine relatively less often, as was ageability and high ratings.
  - One positive finding was that only a small group of respondents associate Oregon with inconsistency.

### Traits Strongly Associated with Oregon Wine, Wineries, Wine Country

(Base = somewhat familiar, and core Oregon wine drinkers)

Cool climate	66%
Distinctly different from California wines	61%
Many small artisan producers or family wineries	61%
Have complex or nuanced flavors	46%
Are easy to pair with a variety of foods	44%
The wines are more like Burgundy than California	42%
Regularly receive high scores or good reviews from the critics	30%
Sustainably farmed, environmentally friendly	28%
Have good aging potential/are worth cellaring	26%
Oregon makes good Pinot Noir, but the other wines I have tried are not to my taste	18%
Inconsistent, wide variety of quality	12%
Frequently recommended by store or restaurant staff	11%

## Oregon Wine Drinker Perceptions of Oregon Wine (*continued*)

### Segment Findings

- Those who consider Oregon wine among their favorites (Fans) were more apt than others to strongly associate Oregon wines with being more like Burgundy than California, being sustainably farmed/environmentally friendly, being made up of small artisan/family producers, and having aging potential and complex/nuanced flavors.
- Compared to more frequent Oregon wine drinkers, respondents who had tried and liked Oregon wines, but don't drink them often, were less apt to agree with most associations, except for inconsistency for which their rate of agreement was consistent with other segments. These respondents also agreed more often that although Oregon makes good Pinot Noir, the other Oregon wines they've tried aren't to their taste.
- Cool climate was strongly associated with Oregon, most often by those who consider Oregon among their favorite wines, but only significantly more often than regular Oregon wine drinkers who “aren't experts” on Oregon wines (Users).
- Weekly/monthly Pinot Noir drinkers more strongly associate Oregon wines with being more like wines from Burgundy and less like wines from California, and the industry being made up of small artisan/family producers. Weekly Pinot Noir drinkers were more apt than others to associate Oregon wines with high scores and good reviews, and ageability.

## Oregon Wine Drinker Perceptions of Oregon Wine *(continued)*

Those who had at least tried and like Oregon wines were asked if they most associated Oregon, Napa Valley, or Sonoma County with a series of characteristics (forced choice). They also had the option to not answer if they were unsure, or did not think that just one of the regions was most associated.

Respondents were most likely to associate Oregon with being sustainably farmed, environmentally friendly (70%); made with organically-grown grapes (69%); and with small artisan or family producers (64%).

- It is of note that sustainable and organic practices are not as strongly associated with Oregon when considered on its own, as when compared to these other regions.
- ✓ Napa Valley most with frequent recommendations, ageability, and high scores or good reviews.
- ✓ Sonoma County was not highly associated with any of the attributes, although it was at rough parity with Napa and Oregon on ease of food-pairing and complex/nuanced flavor.

### Wine Regions by Top Associations (Base = somewhat familiar, and core Oregon wine drinkers)

	OREGON	NAPA VALLEY	SONOMA COUNTY
Sustainably farmed, environmentally friendly	70%	10%	21%
Made with organically-grown grapes	69%	10%	21%
Many small artisan producers or family wineries	64%	13%	23%
Are easy to pair with a variety of foods	33%	33%	35%
Have complex or nuanced flavors	31%	43%	26%
Frequently recommended by store or restaurant staff	10%	72%	18%
Have good aging potential/are worth cellaring	9%	81%	10%
Regularly receives high scores or good reviews from critics	8%	82%	10%

## Oregon Wine Drinker Perceptions of Oregon Wine (*continued*)

### Segment Findings

- ✓ Oregon was consistently associated with organically grown grapes by respondents no matter their Oregon wine familiarity or consumption frequency.
- ✓ Those who consider Oregon a favorite (Fans) were significantly more likely to associate it with sustainability, ease of food pairing, small artisan producers, and complex nuanced flavor. They were also more likely to associate with ageability, yet still twice as many of them cited Napa as Oregon for this attribute.
- ✓ For most associations, triers who don't buy Oregon wine often were similar to those who buy Oregon regularly but are not experts (Users), although fewer of the non-buyers had been exposed to positive Oregon press or recommendations. In these attribute questions, there was greater difference between Oregon wine Fans and Users, than between regular buyers and occasional buyers.
- ✓ Those who had tried and liked Oregon wines but did not buy them often were directionally more likely to associate Napa with ageability, critical acclaim, complex flavor and recommendations.
- ✓ Respondents in their 60s were significantly less apt than those younger to most associate being sustainably farmed/environmentally friendly with Oregon, and more apt to associate Sonoma Country with this characteristic.
- ✓ Men associate high ratings and frequent recommendations with Napa Valley at higher rates than women.
- ✓ The association of Napa Valley with staff recommendations was also higher among respondents in their 40s and 50s than among respondents in other age ranges.

## Oregon Wine Drinker Perceptions of Oregon Wine *(continued)*

Among respondents who had at least tried and like Oregon wines:

Pinot Noir is the Oregon variety consumed most often - the majority drink it monthly or several times a year (65%).

- ✓ The majority drink all other Oregon wines less often than several times a year or not at all.
- ✓ Just over half have not tried Oregon Tempranillo or sparkling wine.

Note: based on previous research and comparison with other data, we believe the frequencies for certain varieties (Syrah, Riesling, Tempranillo and Cabernet Sauvignon) have been slightly exaggerated in this question, because: (a) a number of people did not focus on the fact that they were supposed to indicate their consumption of the Oregon versions; (b) a number of people confused Oregon and Washington wines. The frequencies for these varieties should be regarded with caution.

**Oregon Wine Consumption Frequency by Varietal and Wine Type** (Base = tried/liked, buy/drink Oregon wine regularly or among favorite wines)

	WEEKLY	MONTHLY	SEVERAL TIMES A YEAR	LESS OFTEN	NEVER
Pinot Noir	19%	35%	30%	12%	4%
Cabernet Sauvignon	10%	11%	19%	30%	31%
Pinot Gris or Pinot Grigio	5%	10%	24%	32%	29%
Chardonnay	4%	10%	19%	39%	29%
Syrah	3%	13%	18%	35%	31%
Riesling	2%	6%	21%	35%	36%
Sparkling	3%	5%	15%	25%	52%
Tempranillo	2%	6%	10%	30%	52%

## Oregon Wine Drinker Perceptions of Oregon Wine (*continued*)

### Segment Findings

- ✓ Frequency of consumption for nearly all varieties and wine types rose with the level of Oregon familiarity and consumption frequency (either directionally or significantly).
- ✓ When comparing consumption of varieties from Oregon vs. the same varieties from all sources, it is clear that Oregon is an important source of Pinot Noir for HFHE consumers, but forms a relatively small part of their consumption of other varieties.
- ✓ However, Oregon wine Fans not only source a high proportion of their Pinot Noir from Oregon, Oregon is also an important source Pinot Gris and a significant factor for Riesling and Chardonnay as well.

## Oregon Wine Drinker Perceptions of Oregon Wine *(continued)*

All respondents were asked to rate Oregon, key Oregon regions and competing regions on their typical quality using a 7-point scale that ranged from poor (1) to one of the best (7). If they were not familiar enough with the region, they were asked skip the question.

✓ Not surprisingly, Napa Valley and Sonoma County wines were rated highest on quality (mean rating of 6.3 and 6.0 respectively).

- ✓ Willamette Valley wine (5.6) was rated significantly higher on quality than Oregon, Washington and Walla Walla Valley wine (5.1).
- ✓ Southern Oregon (4.4) was rated lowest on quality, but not far behind Columbia Gorge (4.6).

<b>Quality Ratings by Wine Regions</b>	1 = POOR	(2)	(3)	(4)	(5)	(6)	7 = ONE OF THE BEST	MEAN
Napa Valley	<.5%	<.5%	2%	3%	11%	30%	53%	6.3
Sonoma County	1%	<.5%	1%	6%	19%	36%	37%	6.0
Willamette Valley	1%	1%	4%	13%	21%	32%	28%	5.6
Oregon	1%	2%	5%	21%	34%	26%	11%	5.1
Washington	1%	2%	4%	22%	30%	29%	12%	5.1
Walla Walla Valley	2%	2%	8%	20%	24%	29%	16%	5.1
Columbia Gorge	2%	2%	12%	30%	30%	18%	6%	4.6
Southern Oregon	2%	4%	13%	38%	24%	13%	6%	4.4

## Oregon Wine Drinker Perceptions of Oregon Wine *(continued)*

### Segment Findings

- ✓ Core Oregon consumers rated all Oregon and Washington wine regions higher on quality than respondents with less Oregon wine experience or interest.
- ✓ Ratings of Oregon and its sub-regions are strongly correlated with the frequency of drinking and level of familiarity with Oregon wine (see chart). Napa and Sonoma ratings are fairly stable across segments, but Willamette Valley is rated superior to them by Oregon wine Fans, and equal by Oregon wine "Users."
- ✓ Ratings of Oregon and Willamette Valley are also positively correlated with frequency of Pinot Noir consumption. Weekly consumers of Pinot Noir rated Oregon quality 5.4 on average, Willamette Valley 5.9. Those who drink Pinot Noir monthly rated them 5.0 and 5.7; while those who drink Pinot Noir less often rated them 4.7 and 5.2. Weekly Pinot Noir consumers also rated Southern Oregon and Columbia Gorge higher than other respondents.

**Mean Wine Region Quality Ratings By Oregon Wine Familiarity**

	UNFORMILIAR	SOMEWHAT FOMILIAR WITH OREGON WINE	OREGON WINE "USERS"	OREGON WINE FANS
Oregon	4.1	4.7	5.6	5.8
Willamette Valley	4.0	5.2	6.1	6.5
Southern Oregon	3.8	4.3	4.7	4.7
Columbia Gorge	4.1	4.4	4.9	4.8
Walla Walla Valley	4.1	5.0	5.4	5.5
Napa Valley	6.5	6.3	6.2	6.1
Sonoma County	5.9	6.0	6.1	5.9

## Oregon Wine Drinker Perceptions of Oregon Wine *(continued)*

### Segment Findings *(continued)*

- ✓ Respondents who have tried none or a few Oregon wines rated Napa Valley wines higher on quality than others.
- ✓ Men rated Willamette and Walla Walla Valley wine higher on quality than women.
- ✓ Respondents in their 30s rated Oregon highest on quality.
- ✓ Respondents 50 and older rated Napa Valley higher on quality than respondents under 50, and those 60+ rated Sonoma Country highest on quality.

# OREGON CONSUMER SURVEY 2016

1. On average, how often do you drink wine?

Every day

A few times a week

About once a week

Several times a month

About once a month

Once every 2-3 months

Less often than once every 2-3 months (*Disqualifies*)

2. Please indicate how often, on average, that you buy wine at a retail store (not restaurant) in these price ranges (per 750ml bottle)?

Weekly	Monthly	Several times a year	Less Often	Never
--------	---------	----------------------	------------	-------

Under \$14

\$14 - \$19.99

\$20 - \$29.99

\$30 - \$49.99

\$50.00 or more

3. Please indicate approximately how often you drink the following types of wine. Please include any consumption occasions at home, at the home of friends, in bars, restaurants, or other places where you might drink wine.

Weekly	Monthly	Several times a year	Less Often	Never
--------	---------	----------------------	------------	-------

Pinot Noir

Chardonnay

Riesling

Pinot Gris or Pinot Grigio

Cabernet Sauvignon

Tempranillo

Syrah

Sparkling

4. Please review the list below, and check any activities that you consider as among the activities you most enjoy. Check only those that apply and skip those that do not.

Trying new recipes  
 Entertaining / hosting dinner parties  
 Hiking  
 Bicycling  
 Going to the theater or symphony  
 Going to art galleries or museums  
 Golfing  
 Dining out at new restaurants  
 Attending wine and food events / festivals  
 Visiting wine regions  
 Going on cruises  
 Traveling to new places

*(Order randomized)*

5. Please indicate which of the following words or phrases you strongly associate with the state of Oregon. You may check as many or few as apply, or none, if none apply.

Lively food and restaurant scene  
 Wine  
 Coast  
 Seafood  
 Dramatic landscapes  
 Nature  
 Clean air, environment

Outdoor activities  
 Farmers markets  
 Craft beer/breweries  
 Pioneers  
 Bookstores and cafés  
 Rain, wet climate  
 Fresh fruit and produce  
 Innovation  
 Independent craftspeople  
 Gourmet or artisanal cheese

*(List order randomized)*

6. Thinking about choosing a wine to enjoy with a meal, either at a restaurant or dinner at home, please indicate the importance of each of the following aspects or attributes on the following scale, where “7” equals extremely important and “1” equals not at all important.

Not at all important (1)	2	3	4	5	6	Extremely important (7)
--------------------------	---	---	---	---	---	-------------------------

Matching specific flavors of the wine and the food  
 Versatile and goes with many different foods  
 Balancing the weight of the wine and the food (e.g. big, richly flavored wine with rich dishes)  
 I know my guests or dining companions will like it  
 The wine has good, crisp acidity

Matching the wine and occasion (e.g. a fine or special wine for special occasions)

The wine is smooth and easy drinking on its own

I am already familiar with this type of wine

The wine comes from a region with a great reputation

*(Attributes rotate)*

7. When selecting a wine over \$20, how important are the following attributes?

Not very important (1)	2	3	4	Extremely important (5)
------------------------	---	---	---	-------------------------

Sustainably farmed, environmentally friendly

Made with organically-grown grapes

Has good aging potential / is worth cellaring

Receives high scores or good reviews from critics

Made by a small artisan producer or family winery

Has complex or nuanced flavors

Recommended by store or restaurant staff

Is easy to pair with a variety of foods

Has the unique qualities of the region where it's made

8. Are you familiar with and have you tried wines from the regions listed below? For each row, please choose the ONE answer that best represents your experience.

Know little or nothing about these wines	Have tried wines from this region but don't know them very well	Very familiar with this region's wines and have tried many
--	---	--

Oregon

Washington

Willamette Valley

Southern Oregon (i.e. Applegate Valley, Umpqua Valley, Rogue Valley)

Columbia Gorge

Walla Walla Valley

Napa Valley

Sonoma County

9. How frequently do you drink wines from the following wine-growing areas? Please choose the frequency that most closely describes you.

Never	Less often	Every 2-3 months	Monthly	Weekly
-------	------------	------------------	---------	--------

Oregon (all regions)

Washington (all regions)

Willamette Valley

Southern Oregon (i.e. Applegate Valley, Umpqua Valley, Rogue Valley)

Columbia Gorge

Walla Walla Valley

Napa Valley

Sonoma County

10. Thinking about the first time you remember trying a wine from Oregon, what was the reason you tried that wine? Please check as many of the answers below as apply to your first experience in trying an Oregon wine. If you have not tried any wines from Oregon, please just skip this question.

It was recommended by retailer

It was recommended by a sommelier or the restaurant wait staff

I was just curious

It had been recommended by wine critic or magazine

A friend recommended I try it

It was selected by the host

I heard they make great Pinot Noir

It was being poured at wine tasting or festival

I attended an Oregon-themed wine tasting

I was visiting wineries in Oregon

I can't recall or some other reason (please specify below)

*(Reasons rotate except last one)*

11. Thinking about wines from Oregon, or any wine regions within Oregon; which of the following statements most closely describes you? Please choose the ONE statement that best describes your experience with Oregon wines.

I have tried few or no Oregon wines and don't know much about them. *(Proceed to Q12)*

I have tried some Oregon wines, and don't have much interest in trying them again. *(Skip to Q13)*

I have tried and liked some Oregon wines, but don't buy or drink them often. *(Skip to Q14)*

I buy and drink Oregon wines regularly, although I am not an expert on them. *(Skip to Q15)*

Oregon wines are among my favorites, I am very familiar with many wineries and varieties from there. *(Skip to Q15)*

12. *(ONLY Tried few/none, don't know much from Q11)* Thinking still about wines from Oregon, which of the following statements do you agree with? You may check as many or few as apply.

I don't see many Oregon wines where I shop for wine.

I would buy them more often if I knew which ones fit my taste preferences.

Oregon doesn't make the varieties of wine I like best.

I am not familiar with many Oregon wineries, so I am not sure which to select.

Wines from Oregon are rarely or never on display or recommended where I shop.

I am reluctant to try new wines from Oregon because they are expensive.

I prefer to stick with wines I already know.

I seldom see good reviews or high critics' scores on wines from Oregon.

I have not been impressed by the Oregon wines I have tried.

*(statements rotate)*

*(Skip to Q19)*

13. *(ONLY Tried some, not interested from Q11)*

Which of the following best describes why you have little or no interest in trying Oregon wine again? You may check as many or few as apply.

I have tried them and they are not to my taste

They are too inconsistent - I never know if I'm going to like it or not.

Oregon doesn't produce the varieties or types of wine I like

I like the varieties Oregon produces, but think they are better made in other wine regions

The wines are too expensive

Other reason (please specify)

*(statements rotate)*

*(Skip to Q19)*

14. *(ONLY Tried and liked, but don't buy often from Q11)* Thinking still about wines from Oregon, which of the following statements do you agree with? You may check as many or few as apply.

I don't see many Oregon wines where I shop for wine.

Oregon doesn't make the varieties of wine I like best.

I am not familiar with many Oregon wines, so I am not sure which to select.

Wines from Oregon are rarely or never on display or recommended where I shop.

I am reluctant to try new wines from Oregon because they are expensive.

I prefer bigger, bolder wines than the kinds made in Oregon.

I prefer to stick with wines I already know.

I seldom see good reviews or high critics' scores on wines from Oregon.

I have not been impressed by the Oregon wines I have tried.

*(statements rotate)*

*(Skip to Q16)*

15. *(Buy Oregon regularly or Oregon among favorites from Q11)* You stated earlier that you drink Oregon wines regularly. In your opinion, what makes them different from other wines and what do you like best about them? Please let us know your opinion in a sentence or two, using the boxes below. If you don't feel they are distinctly different or to your taste, please enter "NA" in the text boxes.

Oregon wines are distinctly different because: *(Open-ended text box)*

The things I like best about Oregon wine are: *(Open-ended text box)*

*NOTE: Q16-18 are answered only by 14 (Tried and liked, but don't buy often) AND 15 (Buy Oregon regularly or Oregon among favorites). Those answering Q12 and Q13 skipped to Q19.*

16. Do you strongly associate any of the following traits or statements with Oregon wines, wineries or wine country? Check any or all that apply.

- The wines are more like Burgundy than California
- Distinctly different from California wines
- Inconsistent, wide variety of quality
- Sustainably farmed, environmentally friendly
- Many small artisan producers or family wineries
- Cool climate

Regularly receive high scores or good reviews from critics

Oregon makes good Pinot Noir, but the other wines I have tried are not to my taste

Have good aging potential / are worth cellaring

Have complex or nuanced flavors

Are easy to pair with a variety of foods

Frequently recommended by store or restaurant staff

*(Traits rotate randomly)*

17. Please review the wine characteristics below, and pick the ONE region whose wines you most associate with each characteristic. You may skip any characteristic about which you are not sure or if you don't think it is best exemplified by just one of the regions.

Oregon	Napa Valley	Sonoma County
--------	-------------	---------------

Sustainably farmed, environmentally friendly

Made with organically-grown grapes

Have good aging potential / are worth cellaring

Regularly receives high scores or good reviews from critics

Many small artisan producers or family wineries

Have complex or nuanced flavors

Frequently recommended by store or restaurant staff

Are easy to pair with a variety of foods

*(Characteristics rotate randomly)*

18. Please indicate how frequently you drink the following types of wine of wine from Oregon (or any regions within Oregon).

Weekly	Monthly	Several times a year	Less often	Never
--------	---------	----------------------	------------	-------

- Pinot Noir
- Chardonnay
- Riesling
- Pinot Gris or Pinot Grigio
- Cabernet Sauvignon
- Tempranillo
- Syrah
- Sparkling
- (Varieties rotate)*

19. Please rate the following wines from "7" (one of the best) to "1" (poor) for the typical quality of their wines. If you are not familiar with a specific region, just skip that line.

1 (Poor)	2	3	4	5	6	7 (One of the best)
----------	---	---	---	---	---	---------------------

- Oregon
- Washington
- Willamette Valley
- Southern Oregon (i.e. Applegate Valley, Umpqua

- Valley, Rogue Valley)
- Columbia Gorge
- Walla Walla Valley
- Napa Valley
- Sonoma County

20. Have you visited Oregon in past three years, and did you taste Oregon wines while you were there? Please select the ONE answer that most closely describes any such visits.

- Have not visited Oregon in past three years
- Visited Oregon, did not pay close attention to wine while there
- Visited Oregon, made a point to try Oregon wines while there
- Visiting Oregon wineries was the primary purpose of the trip

21. What is your age?  
*(Drop-down box with exact ages except for "under 21" and "70 or over")*

22. What is your gender?  
 Male      Female

23. In what state do you live? *(Drop-down)*



“ **Wine Opinions** ”

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