

## ***Reflections from An Oregon Wine Industry “Listening Tour” on Research, August 27 – 30, 2018***

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During a four-day period in August 2018, a small group of individuals affiliated with the Oregon wine industry conducted a series of on-site “listening sessions” in six major wine producing regions of the state. Jess Willey, director of strategic insights and industry relations at the Oregon Wine Board (OWB), was the lead organizer for this group. In advance of these visits, she contacted potential participants in each of the regions and invited them to attend a two-hour discussion focused on the current and future viticulture and enology research needs of the Oregon wine industry. The purpose of the tour was to gather input on a state-wide basis for an upcoming industry research summit to be organized by the OWB’s Research Committee. The Research Committee’s goal for this summit is to identify a strategic vision that will guide and inform the OWB’s research program, including its process for soliciting and funding research projects in the coming decade. These listening sessions as precursors to the retreat reflect the OWB’s sincere desire that the outcomes of the retreat reflect an open and inclusive discernment process, with opportunities for input from across the state.

In the days immediately following these sessions, group members from the listening tour compiled their notes, synthesizing the comments and suggestions made during the listening sessions in order to identify common themes, priorities and potential research topics that industry stakeholders had shared during these discussions. Hence, the following summary does not represent the actual conversations that transpired, nor is there any effort made to attribute specific comments or ideas to a particular person. Rather, this document attempts to capture and accurately represent the ideas and perspectives shared at these meetings as they relate to the stated goal of identifying potential research areas, on-going industry challenges and suggestions for how to prioritize research funding in relation to Oregon viticulture and enology.

A major challenge at all of the listening sessions was striking a balance between (a) having a completely open discussion in which all ideas were welcomed and (b) keeping the discussion within the stated goal of identifying strategic priorities to guide funding for viticulture and enology research projects. A second challenge was trying to keep the discussion on task without spending too much of the group’s time and collective effort neither completely “in the weeds” (focusing on specific minutiae) nor always “at the 40,000 feet vantage point” (i.e., focusing on global, systemic industry topics well beyond the session’s intended scope). In the following synthesis of comments, an effort has been made to capture the full range of discussions at the listening sessions, but with primary emphasis on the central objective of these sessions – to inform those who will be attending the upcoming Research Summit about the ideas and suggestions for the strategic direction of viticulture and enology research that were offered and discussed.

Readers interested in background materials prepared in advance of these sessions and/or listening session details should refer to the Appendix of this document, where the following is provided:

- A summary of the specific details about each of the six listening sessions in terms of dates, locations and list of participants;
- A handout prepared by OWB staff that summarized recent research projects funded by the OWB Research Committee, which was distributed at the start of each of the listening sessions;
- The “Case Statement for the Support and Operation of a Research Summit to Develop a Strategic Vision for the OWB Research Program” by Dr. David Beck, past OWB Chair and Past OWB Research Committee Chair, who prepared this statement to motivate and facilitate the process that developed the plans for this listening tour and for the upcoming OWB Research Summit.

### **In search of the central theme**

In 1991, a group of industry leaders gathered at Silver Falls State Park to discuss the future of the Oregon wine industry. The meeting was prompted in part as a response to the 1990 phylloxera crisis in Oregon, but more generally as a realization that having spent the past 25 years establishing the modern era of the Oregon wine industry, there now was a need to share ideas and collectively work to identify a path forward for the industry. From that meeting emerged a unifying theme that has guided decision makers throughout the industry as well as research funding priorities since that event – “quality improvement.” Hence, for over 25 years, the Oregon wine industry has strived to build and sustain the region’s reputation for consistently producing high quality wines. With this history as a motivating reference point, one of the aspirations for the listening tour was the possibility of either re-affirming this central theme or identifying a new, emerging theme that would rally the industry towards a common goal.

No such theme emerged as a clear and obvious choice for the Oregon wine industry. That said, a number of listening session participants commented that such a theme or “umbrella” is needed in order to provide some guidance when prioritizing “hot topic” concerns. These participants felt that the industry has a history of “hopping from one hot topic to the next” without stepping back to assess how each integrates with the greater whole. There also were a number of ideas that were discussed at the listening sessions that have the potential for being developed into a central theme. For example, there were those who advocated for the continuing focus on “quality improvement” as this theme has served the industry well. There also were recurring comments related to the general topic of “sustainability,” especially in light of climate change, with specific suggestions for research that focuses on mitigating the effects of climate change without necessarily abandoning existing varietals. Yet another recurring set of related comments focused on the ideas of “maintaining our success” and “protecting our assets and reputation.” With these comments, participants were asserting that “making high quality wines” was now the industry standard that defined Oregon wines, so the idea of “high

quality” needed to be thought of more broadly in terms of how the industry could build upon that baseline to ensure continued industry competitiveness and viability.

### **Identifying trade-offs**

In the absence of a clear and widely shared central theme, another approach for articulating a strategic vision for viticulture and enology research emerged as participants discussed and grappled with potential trade-offs that could be a consequence of setting research priorities within the context of that vision. In general, there was recognition that trade-offs are an inevitable outcome of any visioning and priority-setting process. There was, however, an appreciation that many of the potential trade-offs related to setting research priorities would not necessarily mandate absolute “either/or” choices about those priorities. Hence, when faced with a trade-off within a set of two related prioritizing options, listening session participants suggested that the Research Committee can choose to allocate research dollars to “some of both” possible research priorities but perhaps the Committee also can/should “tip the scale” to allocate a larger percentage of funding to one priority over the other. Listening session discussions led to the identification and/or affirmation of the following trade-offs, along with suggestions for how to strike a balance between them:

- *Immediate needs vs. longer-term issues* – Many participants willingly acknowledged that their first instincts are to favor practical, specific, problem-solving research projects that address immediate needs. Current examples that were suggested include strategies for dealing with atmospheric smoke (i.e., mitigating smoke taint in wine, barriers/biofilms on grapes to prevent smoke taint in wine, impact of smoke on growing conditions, photosynthesis and diurnal shifts, etc.), red blotch and trunk diseases, water berry (sugar accumulation disorder), managing powdery mildew and fungicide resistance, and rootstock and variety selection. Yet, many/most participants across all six listening sessions also advocated for some research on more long-term issues, generally suggesting that the majority of funding should go towards immediate issues, but there also needed to be some funding allocated to longer-term issues, though no actual consensus emerged as to the exact balance or percentage split. For example, as one participant noted, putting an exact percentage of research dollars for one or the other would not be practical or appropriate, since in any given year, conditions might justify favoring one or the other.

Also of note, “longer-term issues” had different meanings for different participants. Some defined this kind of research in terms of addressing chronic, recurring problems like how to eradicate powdery mildew, water management issues and/or labor usage and mechanization issues. Others expressed “longer-term issues” in terms of support for basic research (i.e., research that would not have immediate applicability in the vineyard or winery such as genomics research, multi-year longitudinal studies of soil biome and/or micronutrient management, or evaluating long-term impacts of and developing recommendations for responding to climate change). A third perspective about “longer-term” were those who expressed an expectation that the OWB Research

Committee should provide leadership on identifying and funding research on visionary, emerging issues that many/most growers and winemakers might not even know about (i.e., not all problems present an immediate threat nor does all research need to be problem-driven or seeking remedies, since some research can/should be proactive, exploratory and creative in order to spark industry innovations).

- *Viticulture vs. enology research* – In general, most participants expressed support for both types of research, but with the balance tilted towards viticulture. Participants noted that they valued viticulture research because it has the potential to directly affect management practices in the vineyard, and that what happens in the vineyard directly impacts what can happen in the winery. Hence, heading off problems in the vineyard reduces issues for the winemaker and thus benefits both viticulture and enology. Many respondents supported the split indicated in the OWB handout distributed at each of the listening sessions – the recent trend in research funding has been about 75% viticulture research projects and 25% enology projects (see Appendix for copy of handout). Participants, however, did not advocate for rigidity in this split, recognizing that conditions and issues vary over time. Similarly, a recurring observation made by participants was that the “ideal” funding model that was appreciated the most, even while recognizing that not all research projects could or should fit this model, would be projects that fully integrate viticulture research with enology research so that vineyard practices being researched are subsequently evaluated in terms of how and in what ways those practices affect wine quality. Numerous references to the recent crop load study were made in terms of it being an excellent example of this type of linked research.
- *Scale-neutral vs. small scale vs. large scale operations* – Though this type of trade-off was not always discussed in these specific terms, there were numerous participants at multiple sessions that advocated for research that accounted for differences in scale of operations and, when possible, compared potential impacts of research outcomes in terms of small vs. large operations. Of particular concern was that funding should include research that was either scale-neutral or that targeted smaller vineyards and wineries. As some noted, most operations in Oregon are small scale, so by default research that looked explicitly at small scale growers and winemakers would have the broadest number of potential beneficiaries. For these participants, if they were faced with a choice between funding a project that would have a greater potential benefit for large scale operations vs. funding a project that would have a greater potential benefit for smaller operations, then they would choose to fund the latter.
- *Geographic area, in terms of AVA- or regional-specific vs. state-wide vs. multi-state/national/international* – In general, most participants expressed strong preferences for funding research that specifically targeted issues of direct consequence to the Oregon industry, especially if those issues were unique to Oregon. Outside of the Willamette Valley, participants expressed strong interest in having more research that accounted for differences across the growing regions of the state. A recurring

suggestion was that more research should be conducted in multiple sites throughout the state (including on-site in Oregon vineyards) in order to more effectively account for these differences, and/or having at least some research projects that address specific issues within a particular region of the state. In terms of broader collaborative research in a multi-state or international context, participants' support typically was conditional on the research being jointly funded with outside agencies, with at least some work sited in Oregon, and/or that the research projects were of particular benefit to Oregon.

- *Annually funded projects vs. multi-year funding for projects* – Typically, participants did not comment on research funding priorities in these terms unless prompted by the listening tour group members. But once prompted, comments were generally supportive of having a mix of the two, as long as the majority of funds supported projects with an annual funding cycle. This reflected the already acknowledged preference for “*problème du jour*” research focusing on immediate issues conditional on an appreciation for some longer-term projects that was previously noted in this document. In general, participants readily understood that research that addressed longitudinal issues would necessarily need a commitment of funding that extended beyond an annual funding cycle. They also appreciated the constraints that this type of multi-year funding commitment would put on the OWB Research Committee's ability to fund new or emergency research issues on an annual basis.
- *Conventional practices vs. organic/biodynamic/certification programs* – Though not discussed at every listening session, participants at some sessions did support funding viticulture and enology research projects that evaluated production practices such as organic, Salmon-Safe, Oregon LIVE, or biodynamic, and/or research that compared conventional to these other practices.

### **Screening criteria that may be poorly defined but well understood**

As discussions progressed at each of the listening sessions, participants often shared sentiments about what they considered to be “good” research projects, i.e., projects that they would consider a “good use” of OWB research funds. These sentiments were similar across sessions, however, they sometimes were expressed in qualitative terms that would be hard to operationalize in terms of setting research priorities. Other sentiments provided broad parameters that would apply across all funded proposals, while still other comments were rooted in a desire to see pragmatic outcomes from funded research. The following summary of representative comments might best be treated as a set of informal screening criteria that could complement technical evaluation of the scientific merit of research proposals. That is, they could help articulate the proverbial “smell test” for research proposals, thus providing yet more considerations for how to set research funding priorities:

- Is the research meaningful and relevant?
- Will the research help the Oregon wine industry get bigger, better and/or more profitable? Will the research help individual growers and/or winemakers earn more money in return for their efforts?

- Will the research findings have clear, actionable recommendations?
- Will the research affect what I actually do in the vineyard and/or winery?
- Will recommendations coming from research projects generate a positive ROI for my vineyard or winery?
- Is the research Oregon-focused, or at least directly applicable to Oregon issues?
- Will we be able to extrapolate the research findings throughout the state?
- Will the research engage multiple partners/collaborators, including research conducted in Oregon vineyards, directly working with growers and winemakers?
- Will the research engage multiple partners/collaborators, including academic programs throughout the region in addition to Oregon State University (e.g., SOWI, Walla Walla, Umpqua and Chemeketa Community Colleges, Lindfield College, Washington State University, etc.)
- Will the research directly link recommendations for vineyard management to wine quality/winemaker decisions, and then to business outcomes and customer satisfaction?

### **And since you asked – A clear call for better communication and information distribution**

One of the most consistent and strongly vocalized issues that came from the listening sessions was a call for better communication, engagement and information distribution. At every session, participants expressed their concerns about the dissemination of research findings. Though generally very supportive of current and past research projects funded by the OWB, a widely held view among listening session participants was that they had, individually and collectively, a relatively low level of awareness of the outcomes of those research projects, and that they had limited access to research findings in general. Major constraints to gaining access included an inability to effectively find relevant research publications and/or being blocked from accessing these findings due to paywalls maintained by those who published the research findings. Additional constraints included limited internet access in rural settings, an inability to review/read research findings published in languages other than English, and lastly, personal and professional time constraints that limited their ability to invest more effort in seeking out available information. Proposed solutions included:

- A call for a review of possible digital tools that could be developed to improve accessibility to research findings;
- The creation of an information “curator” or “aggregator” who could filter, organize, and “boil down” scientific, technical findings into actionable recommendations;
- The creation of an internet-accessible information database/clearing house that sorts and presents research findings topically;
- The creation of an internet-accessible information database/clearinghouse that gathers, sorts and presents Oregon-specific information about vineyard and winery practices (e.g., a rootstock inventory), thus harnessing local knowledge and collaborative efforts of grower groups, AVAs and other regionally-organized meetings.

Participants also called for greater outreach by funded researchers that would include presentations and workshops throughout the state based upon their research projects, and would also include project calendars with regular updates on the progress of those projects.

Given the voracity and ubiquitous expressions made about this issue, the OWB Executive staff, OWB Board members and the OWRI Program Coordinator all expressed intentions for following up on this point, both within the context of the upcoming Research Summit and more broadly in terms of continuing discussions about how to address this issue.

### **And since you asked – Economic, business and market issues**

Another general area of interest expressed by participants that was beyond the stated scope and intent of the listening sessions concerned suggestions about research priorities that focused on the economics and business dynamics of the Oregon wine industry. The following list summarizes general areas of interest in order to capture and record these comments, recognizing that these issues should be reviewed and prioritized as part of a separate, subsequent planning exercise.

- Evaluating the economic viability and profitability of Oregon vineyards and wineries in terms of scale, scope and other determinants of both costs and revenues;
- Evaluating the cause and consequences of larger volumes of harvested grapes and (over-)supply of grapes in some/most AVAs in Oregon;
- Estimating the economic consequences (pros and cons) of establishing standards that define and signal quality in the marketplace along with addressing the need to structure market mechanisms and/or policies to enforce those standards;
- Analyzing the costs and returns related to specific innovations and technologies (e.g., mechanization vs. manual labor; different approaches to water management; comparative studies of conventional vs. organic/biodynamic/certified sustainable practices);
- Analyzing the economics of vineyard replacement (driven by a range of biological, climatic and market conditions);
- Evaluating trade-offs and/or complementarities of simultaneously pursuing sustainable practices and economic viability.

## Appendix A: Listening Session Dates, Locations, Attendees and Listeners

### 1. Southern Willamette Valley Listening Session

**Date & Time:** August 27, 2018, 9-11 a.m.

**Location:** Oregon Wine Lab, Eugene

#### Attendees

Jim	Bradshaw	Bradshaw Vineyards
Edward	Burke	King Estate
Natalie	Inouye	Travel Lane County
Bri	Matthews	Travel Lane County
Robin	Pfeiffer	Pfeiffer Vineyards & Winery

#### Listeners

Kevin	Chambers	Koosah Farm
Marie	Chambers	Oregon Wine Board
Mark	Chien	Oregon Wine Research Institute
Tom	Danowski	Oregon Wine Board
Denise	Dewey	Oregon Wine Research Institute
John	Pratt	Celestina Vineyard
James	Sterns	Oregon State University
Jason	Tosch	Stoller Family Estate
JP	Valot	Silvan Ridge Winery
Jess	Willey	Oregon Wine Board

### 2. Northern Willamette Valley Listening Session

**Date & Time:** August 27, 2018, 2-4 p.m.

**Location:** OSU Yamhill Valley Extension Center, McMinnville

#### Attendees

Barb	Bond	Bois Joli Vineyard
Chris	Burrough	Twomey Wines
Ted	Casteel	Bethel Heights Vineyard
Julia	Cattrall	Lumos Wine Company
Carla	Chambers	Koosah Farm
Peter	Ebbers	Anne Amie Vineyard
Ariel	Eberle	Yamhill Valley Vineyards
Janelle	Engel	Failla Wines
Stirling	Fox	Stirling Wine Grapes
Lynn	Griswold	Yamhill Valley Vineyards
Robert	Harder	George Fox University
Allen	Holstein	Holstein Vineyard
Dan	Huson	Rose City Labs
Lisa	Itel	Travel Oregon
Greg	Jones	Linfield College
Beth	Klingner	Dion Vineyards
Ken	Kupperman	Jackson Family Wines
Mariah	LaChapell	Wilbur Ellis
Andy	McVay	Wine By Joe
Florent	Merlier	Van Duzer Vineyards
Karl	Mohr	NW Vineyard Service

#### Attendees (cont'd)

Jessica	Mozeico	Et Fille Wines
Donald	Olson	Torii Mor Winery
Karen	Peterson	Montinore Estate
Travis	Proctor	Wine By Joe
Joth	Ricci	Adelsheim Vineyard
Richard	Riggs	OSU
Sharon	Wagner	Linfield College

#### Listeners

Leigh	Bartholomew	Results Partners
Kevin	Chambers	Koosah Farm
Marie	Chambers	Oregon Wine Board
Mark	Chien	OWRI
Tom	Danowski	Oregon Wine Board
Denise	Dewey	OWRI
Stacey	Kohler	Oregon Wine Board
Lydia	Mullany	Oregon Wine Board
John	Pratt	Celestina Vineyard
James	Sterns	Oregon State Univ.
Jason	Tosch	Stoller Family Estate
Jess	Willey	Oregon Wine Board

### 3. Walla Walla Valley Listening Session

**Date & Time:** August 28, 2018, 11:30 a.m. - 1:30 p.m.

**Location:** Walla Walla Community College, Walla Walla, WA

Attendees			Listeners		
Tim	Donahue	WW Community College	Kevin	Chambers	Koosah Farm
Sadie	Drury	Seven Hills Vineyard	Mark	Chien	Oregon Wine Research Institute
Aiden	Fleischer	WW Valley Wine Alliance	Tom	Danowski	Oregon Wine Board
Daniel	Garcia	WW Community College	John	Pratt	Celestina Vineyard
Cynthia	Hurlbutt	The Walls	James	Sterns	Oregon State University
Jason	Magnaghi	Figgins Family Winery	Jason	Tosch	Stoller Family Estate
Norm	McKibben	Pepper Bridge Winery	Jess	Willey	Oregon Wine Board
Cecilia	Pleake	The Walls			
Ashley	Riggs	WW Valley Wine Alliance			
Georgeanne	Robertson	WW Community College			
Steve	Robertson	Delmas Wines / SJR Vineyard			
Tom	Waliser	Waliser Estate / Various			

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### 4. Columbia Gorge Listening Session

**Date & Time:** August 29, 2018, 8-9:30 a.m.

**Location:** OSU Mid-Columbia Agricultural Research and Extension Center, Hood River

Attendees			Listeners		
Alan	Busacca	Volcano Ridge Vineyard	Kevin	Chambers	Koosah Farm
Trevor	Hertrich	Idiot's Grace Vineyard	Mark	Chien	Oregon State University
Brian	McCormick	Idiot's Grace Vineyard	Tom	Danowski	Oregon Wine Board
Bill	Swain	Phelps Creek Vineyard	John	Pratt	Celestina Vineyard
Ashley	Thompson	OSU MCAREC	James	Sterns	Oregon State University
			Jason	Tosch	Stoller Family Estate
			Jess	Willey	Oregon Wine Board

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### 5. Umpqua Valley and Red Hill Douglas County Listening Session

**Date & Time:** August 29, 2018, 2:30-4:30 p.m.

**Location:** Southern Oregon Wine Institute at Umpqua Community College, Roseburg

Attendees			Listeners		
Dan	Ashby	Mesa Vineyard Management	Kevin	Chambers	Koosah Farm
Terry	Brandborg	Brandborg Winery and Vineyard	Mark	Chien	Oregon State University
Bob	Hackett	Travel Southern Oregon	Tom	Danowski	Oregon Wine Board
Rob	Ikola	Whitetail Ridge Vineyard	John	Pratt	Celestina Vineyard
Jean	Kurtz	Umpqua Valley Winegrowers	James	Sterns	Oregon State University
Chris	Lake	Abacela	Jason	Tosch	Stoller Family Estate

Mike	McNally	Fairsing Vineyard	JP	Valot	Sylvan Ridge Winery
Elin	Miller	Umpqua Vineyards	Jess	Willey	Oregon Wine Board
Robin	Ray	Cooper Ridge Vineyard			
Alison	Reeve	Blue Heron Vineyards			
Eric	Reichenbach	Southern Oregon Wine Institute			
Steve	Renquist	OSU Extension, Douglas County			
Ron	Schofield	Deerwood Vineyard			
Teal	Stone	Blue Heron Vineyards			
Taylor	Stone	Blue Heron Vineyards			
Andy	Swan	Southern Oregon Wine Institute			

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## 6. Rogue Valley and Applegate Valley Listening Session

**Date & Time:** August 30, 2018 9-11 a.m.

**Location:** OSU Southern Oregon Research and Extension Center

Attendees			Listeners		
Tony	Antonov	Wooldridge Creek	Kevin	Chambers	Koosah Farm
Chris	Butler	Chehalem Winery	Mark	Chien	Oregon State University
Craig	Camp	Troon Vineyard	John	Pratt	Celestina Vineyard
Jason	Coates	Results Partners	James	Sterns	Oregon State University
Tobias	Everitt	Wooldridge Creek	Jason	Tosch	Stoller Family Estate
Steve	Grande	Wooldridge Creek	JP	Valot	Sylvan Ridge Winery
Bob	Hackett	Travel Southern Oregon	Jess	Willey	Oregon Wine Board
Chris	Hubert	Results Partners			
Michael	Moore	Quail Run Vineyards			
Brad	Niva	Travel Southern Oregon			
Rich	Roseburg	OSU SOREC			
Greg	Schultz	Schultz Wines			
Scott	Steingraber	Kriselle Cellars			
Andy	Swan	Southern Oregon Wine Institute			
Draga	Zheleva	Wooldridge Creek			

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## Appendix B: [Research Overview Handout](#)

## Appendix C: [Case Statement for the Support and Operation of a Research Summit to Develop a Strategic Vision for the OWB Research Program](#)