



Overview of the 2019 Vineyard and Winery Report Methods September 2020

As part of its research mandate, the Oregon Wine Board (OWB) commissions an annual Oregon Vineyard and Winery Report. These studies were historically conducted by the U.S. Department of Agriculture. Between 2012 and 2016, the Southern Oregon University Research Center (SOURCE) produced the reports. Since 2017, the Oregon Wine Board has contracted the University of Oregon's Institute for Policy Research and Engagement (IPRE) to prepare the report.

Intent of this Paper

The purpose of this overview is to provide readers who desire more information about the data collection and statistical modeling procedures used to compile the annual Oregon Vineyard and Winery Report with a general overview. The intent is not to provide a detailed description of all the methods and assumptions used to develop the report; rather we aim to answer a few basic questions that we commonly receive regarding the report. The overview assumes some level of knowledge about data collection and statistical modeling.

Data Collection

This project intends to collect data from all wineries and wine grape producers in the state of Oregon. The intent is to document the scope and breadth of Oregon's wine industry in each vintage and over time. Thus, the project is effectively a large-scale data collection and analysis effort that involves requesting data from every known vineyard and winery in Oregon. A big part of this effort is working with wineries and wine grape producers to encourage them to respond.

With guidance from OWB, IPRE develops and administers the winery and wine grape producer data collection instrument. IPRE uses the systematic approach to design and analysis developed by Dr. Don Dillman at Washington State University called the "[Tailored Design Method for Mail and Internet Surveys](#)." Dillman advocates a structured administration process with structured follow-up to boost response rates. IPRE uses a data collection instrument that was developed by USDA and refined by both SOU and IPRE (see appendix for the data collection instrument).

The process begins by building a database of all known wineries and vineyards in the state. IPRE uses data from the [Oregon Liquor Control Commission](#) (OLCC) on licensed producers supplemented by data from Wines & Vines, a private data management company. No complete central database exists of vineyards. IPRE relies on lists previously developed for the study, information from the Oregon Wine Board and its partner associations, lists from [Wines & Vines Analytics](#) and [Everyvine](#), as well as Internet research to develop the list of vineyards. IPRE expends considerable effort in reviewing and validating the lists each year. The unit of analysis is individual producers (business entities). Building and maintaining the database is a big part of the project—given how dynamic the wine industry is. Table 1 shows the number of wineries and vineyards in Oregon by region.

Table 1. Vineyards and Wineries in Oregon, by Region, 2019

Region	Vineyards	Wineries
North Willamette Valley	764	597
South Willamette Valley	113	79
Umpqua Valley	80	48
Rogue Valley	201	108
Columbia River	123	53
Other Oregon	16	23
Total	1,297	908

IPRE’s database includes 1,639 businesses. It is important to note the overlap that exists in the population—many entities have both a vineyard and winery; some are just vineyards; some are just wineries. A further complication emerges for vineyards and wineries that are linked, but do not share the same name. This is further complicated by the fact that the vineyard section disaggregates results by both region and variety. Many growers produce more than one variety and many wineries produce more than one type of wine.

IPRE uses a mixed mode methodology to collect data. Producers for which IPRE has an email contact receive a solicitation to submit data online. IPRE uses the online platform Qualtrics to manage the mailings. Qualtrics allows management of all aspects of the administration and provides data on who provided data, how long it took, as well as managing follow-up correspondence sending reminders only to individuals that have not provided data. In 2019, we contacted individuals on the list up to a dozen times. The Oregon Wine Board also shared links to the data collection instrument several times to ensure that any producers that IPRE did not have listed in its database had an opportunity to respond.

The data collection instrument is broadly divided into two sections: (1) the vineyard section; and (2) the winery section. It uses conditional branching to direct respondents to appropriate areas of the data collection instrument. For example, if an entity does not grow grapes, the respondent will skip the vineyard section. Appendix A includes a copy of the data collection instrument.

Analysis

The Vineyard and Winery Report is based on a sample. The results presented in the 2019 Vineyard and Winery Report were developed through statistical models that weighted up the sample data to represent estimates of the scope and extent of production across many different variables.

IPRE received 556 responses in our 2019 data collection process. The overall response rate is limited as an indicator of the quality of the data IPRE uses to prepare the report. The industry is composed of businesses of all sizes, with a small number of large businesses that account for a significant proportion of total production.

Table 2 shows the number of data points collected for vineyards for all varieties by region (note that vineyards that grow more than one variety provide data for all varieties grown). For example, if a vineyard in the North Willamette Valley reported growing three varieties, it would account for three of the 576 data points collected for that region. These data points provide the foundation for Tables 1-3 in the vineyard section.

Table 2. Vineyard Section – Number of Data Points by Region for All Varieties

Region	Data Points
North Willamette Valley	576
South Willamette Valley	201
Umpqua Valley	111
Rogue Valley	294
Columbia River	116
Other Oregon	22
Total	1320

Producers reported 12,700 planted acres, or 34% of the 37,399 estimated total planted acres. The harvested acres and production figures are estimated using ratios based on vineyards that provided data for all three variables, and by reviewing trends observed in previous reports. The Research Team makes estimates for harvest and production vineyards that did not provide complete data, consistent with footnote 1 of the vineyard tables (Includes estimates for incomplete responses). These methods improve the overall accuracy of the results and compensate for incomplete responses.

Table 3 shows response to the winery section by region. Overall, 493 wineries provided at least some data for a 54% response rate. Responding wineries reported crushing 41,030 tons of grapes in 2019. This represents 48% of the estimated 84,592 tons crushed in 2019. The research team analyzes wineries by amount of production to develop industry-level models. A few large producers account for a substantial amount of overall production. The reason that 54% of wineries reported 48% over the overall crush is explained by the fact that a higher proportion of smaller producers provided data for the 2019 report.

Table 3. Winery Section – Response Rate by Region

Region	Wineries Reporting	Total Wineries	Response Rate
North Willamette Valley	295	597	49%
South Willamette Valley	54	79	68%
Umpqua Valley	28	48	58%
Rogue Valley	65	108	60%
Columbia River	36	53	68%
Other Oregon	15	23	65%
Total	493	908	54%

Limitations of the Methods and Results

This project is basically a census – IPRE requests data from all vineyards and wineries in Oregon. Ideally, we would collect data from all producers, however, many producers do not provide data. Thus, the Oregon Vineyard and Winery Report uses a sampling methodology to model the scope of Oregon’s grape and wine production. As with all studies, IPRE observes considerable year-over-year variability in the sample data. This is due to the heterogenous nature of Oregon producers. This variability is considered in our modeling, but creates challenges as the results are disaggregated by region, variety and sales channels. An ongoing challenge is partial responses—many producers only provide part of the requested information, which compounds modeling challenges. IPRE is confident the industry totals presented in the report present a reasonably accurate estimate of vineyard and winery production in Oregon given what is reported. The accuracy of the data is reduced as it is disaggregated by region and other variables.

About the Institute for Policy Research & Engagement

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the Department of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of the IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

The University of Oregon Economic Development Administration University Center is a partnership between the Community Service Center, RAIN @ UO, the Lundquist Center for Entrepreneurship, the Oregon Business Consulting Group, and UO faculty. The UO Center provides technical assistance to organizations throughout Oregon, with a focus on innovation, entrepreneurship, and rural economic development. The UO Center seeks to align local strategies to community needs, specifically with regards to building understanding of the benefits of sustainable practices and providing technical training to capitalize on economic opportunities related to those practices. The EDC is partially funded through a grant from the U.S. Department of Commerce, Economic Development Administration.

Appendix: Vineyard and Winery Report Data Collection Instrument



Intro

Dear Oregon Vineyard Operator and/or Wine Producer,

Welcome to the **2019 Oregon Vineyard and Winery Production Report** form. We understand that this is a trying time for business in Oregon. The COVID-19 pandemic has affected broad swaths of Oregon's economy--including the wine industry. Collecting quality data for 2019 will provide a baseline for how the industry will be affected in 2020. We encourage you to participate in the 2019 report to ensure the highest quality data possible.

Note that due to access restrictions and health concerns, we are only offering the survey online this year. Unfortunately, we are unable to provide printed or pdf copies.

This project is being completed by the University of Oregon Institute for Policy Research and Engagement (IPRE) on behalf of the Oregon Wine Board. **The information you provide is kept confidential and secure.** NO INDIVIDUAL GROWER or WINERY DATA will be used or shared with any party outside the University of Oregon Institute for Policy Research and Engagement, except as the UO's funding agreement from the Oregon Wine Board allows to facilitate the development of future Oregon Vineyard and Wine Production Reports. Data from your business are combined with all Oregon vineyards and wineries to

produce the annual Oregon Vineyard and Winery Production Report. The report provides the most complete picture of Oregon's wine production, including grape pricing, for all of the wine growing regions.

Multiple people in your organization may receive a request to complete this survey. We encourage you to talk with other people in your organization prior to starting the survey and to select a single individual to complete the form or to complete it as a group. We only need one response from your organization. The heading for each section of the census indicates the document(s) that will help you complete that section.

If you have any questions regarding the census please contact Robert Parker at the University of Oregon Institute for Policy Research & Engagement by phone at 541-346-3801 or email (rgp@uoregon.edu).

Your participation is greatly appreciated.

Click Next >> to continue.

Please fill in the your name and the name and address of your business.

Name:

Business Name:

Address:

City:

State:

Zip Code:

During 2019, did your operation **grow wine grapes in leased and/or owned Oregon vineyards** for estate use, for sale, and/or for trade?

Yes

No

Vineyard info

VINEYARD INFORMATION- Fill out this section if you grew wine grapes in leased and/or owned Oregon vineyards for estate use, for sale, and/or for trade in 2019. Do not include vineyards rented or leased to others.

List all vineyards and total acres your business owns/leases. Include non-bearing acres.

	Vineyard Name	Located in which Oregon county?	No. of acres your business owns and/or leases (include non-bearing).
Vineyard 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 4	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 5	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 6	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 7	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 8	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 9	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 10	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 11	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vineyard 12	<input type="text"/>	<input type="text"/>	<input type="text"/>

In what growing region is the largest percentage of the vineyards listed on the previous question located? (Please select one below.)

- North Willamette Valley** (including Yamhill-Carlton, Chehalem Mountains, McMinnville, Ribbon Ridge, Dundee Hills, Eola-Amity Hills, and Van Duzer Corridor)
- South Willamette Valley** (defined as being in the Willamette Valley AVA and south of Monmouth and the South Salem Hills)
- Umpqua Valley** (including Red Hill Douglas County and Elkton, Oregon)
- Rogue Valley** (including Applegate Valley)
- Columbia River** (including Columbia Gorge, Columbia Valley and Walla Walla Valley, and The Rocks District of Milton-Freewater)
- Other Oregon area** (outside any of the other regions)

Please indicate the **total tons** for all varieties for each of the following categories:

Total tons used by wineries under same ownership as vineyard

Total tons sold in 2019 to third parties in Oregon (not under the same ownership as vineyard)

Total tons sold in 2019 to third parties outside Oregon (not under same ownership as vineyard)

Total tons that went unsold or unused

Total

Check ALL varieties grown in vineyards reported on this form **including non-bearing**

acres.

- Albariño
- Cabernet Franc
- Cabernet Sauvignon
- Chardonnay
- Chenin Blanc
- Gamay
- Gewürztraminer
- Malbec
- Merlot
- Müller-Thurgau
- Pinot Blanc
- Pinot Gris
- Pinot Noir
- Riesling
- Sangiovese
- Sauvignon Blanc
- Syrah
- Tempranillo
- Viognier
- All other varieties

Use data from Vineyard Records, Grape Sale Invoices and Weigh Tags to complete this section

Complete the following table as accurately as possible with information regarding your vineyard operation(s). Please fill in all columns for each of your grape varieties; use zeros or dashes as necessary. *Report only those grapes from vineyards you leased or owned. Do not include grapes you purchased. If grapes were processed and sold as bulk wine or bulk juice, please report the harvest information below, but report the sale in the following section.*

If a grape variety is missing from this list that you need to report, use the back button "<<" at the bottom of the page to go to the list on the previous page to add it.

The last column is **Total Dollars Billed (for tons sold) to parties outside Oregon.**

Report **acreage** to the **nearest tenth of an acre.**

Report **production** to the **nearest tenth of a ton.**

Note: Some of the columns of the table may not appear on your screen - scroll to the right to see all the columns.

	Total planted acres of grapes (include non-bearing)	Acres harvested in 2019	Total Tons harvested in 2019	T incl pe un
» Albariño	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

No Vineyard crush qualifier

During 2019, did your business have **estate grapes, purchased grapes, or grapes acquired through trade crushed in Oregon** in 2019 for own label, private label sale, and/or for sale as bulk juice or bulk wine regardless of where they were crushed.

Yes

No

Winery Crush

WINERY INFORMATION

Use the TTB Report, Vineyard Records and Winery Records to complete this section.

In what Oregon county is your winery located? (if more than one, select primary county)

Crush Detail (b + c should equal a):

a) How many **total tons of wine grapes were crushed** for your brand/label, private label sales, or bulk juice and/or bulk wine sales in 2019?

b) Of the **total tons** reported in the previous question, how many tons were **grown in Oregon?**

c) Of the **total tons** reported in the question prior to the last one, how many tons were **grown outside of Oregon?**

What percentage of the grapes reported in the previous three questions were crushed at:

Your facilities

Other facilities (e.g., another winery or custom crush facility)

Total

How many **gallons** of wine were produced for your label, private label sales, or bulk juice/wine sales in 2019?

Does your business ferment wine at its own facility?

- Yes
- No
- Other (please explain)

Purchase Bulk Wine Qualifier

During 2019 did your operation purchase bulk wine or bulk juice and/or receive wine as a trade?

- Yes
- No

Bulk Wine Purchase

Use the [TTB Report](#), [Vineyard Records](#) and [Winery Records](#) to complete this section.

Bulk Wine Purchase/Wine Trade – Fill out this section if you purchased bulk wine or bulk juice and/or received wine as trade in 2019.

How many **gallons of bulk wine or bulk juice** did your business **purchase or receive in trade** to be sold under your own label in 2019?

How many **cases (1 case = 9L) of bottled wine** did your business **purchase or receive in trade** to be sold under your own label in 2019?

Sales Qualifier

During 2019 did your operation **sell Oregon wine** under your own label, and/or as a private label, and/or as bulk juice or bulk wine?

Yes

No

Winery Sales

WINE SALES INFORMATION

Use Sales Records to complete this section.

List all brands, labels or winery names for which sales figures will be reported.

Please report sales figures for your business from January 1, 2019-December 31, 2019 for all vintages of wine produced in Oregon by your business.

What were your **total dollar** sales in 2019 for all vintages of Oregon-produced wine?

What percentage of the total dollar sales in the previous question were from bulk juice/wine sales?

Please indicate the total gallons of Oregon-produced **wine purchased** in 2019 as bulk wine or bulk juice.

Please indicate total gallons of Oregon-produced **wine sold** in 2019 as bulk wine or bulk juice.

Please indicate the total cases (1 case = 9L) of Oregon-produced **wine bottled** in 2019 for all vintages.

Please indicate the total cases (1 case = 9L) of Oregon-produced **wine sold** in 2019 for all vintages including exports.

Using the **total wine cases sales reported in the previous question**, please report the number of cases (1 case = 9L) sold via each of the following channels in 2019. **Total sum of all cases should equal the figure reported on the previous question.**

Direct to Consumer - In tasting rooms	<input type="text" value="0"/>
Direct to Consumer - Through wine club	<input type="text" value="0"/>
Direct to Consumer - Website/phone orders	<input type="text" value="0"/>
Sold in Oregon - Wholesale	<input type="text" value="0"/>
Sold in Oregon - Direct to trade	<input type="text" value="0"/>
Wholesale - Sold Nationally outside of Oregon	<input type="text" value="0"/>
Wholesale - Sold Internationally	<input type="text" value="0"/>
Wholesale - Private Label Sales	<input type="text" value="0"/>
Total	<input type="text" value="0"/>

If you reported **international sales** in the previous question, please report the number of cases exported by destination. **Total sum of all exported cases should equal the figure reported as "sold internationally" on previous question.**

Canada	<input type="text" value="0"/>
Mexico	<input type="text" value="0"/>
Denmark	<input type="text" value="0"/>
United Kingdom	<input type="text" value="0"/>
Sweden	<input type="text" value="0"/>
All Other Europe	<input type="text" value="0"/>
Hong Kong/China	<input type="text" value="0"/>
Japan	<input type="text" value="0"/>
South Korea	<input type="text" value="0"/>
All Other Asia	<input type="text" value="0"/>
All Other International Destinations	<input type="text" value="0"/>
Total	<input type="text" value="0"/>

Comments/Info

Please provide your contact information or the information for who we should send future
Census forms to:

Name

Position

Phone Number

Email

Your additional comments about census/production.

Please click submit to submit your form.

Thank you for your participation!

No vyd no crush no sales NONE OF THE ABOVE

Please explain why none of these statements apply to your business. If there has been a change in the operator, please provide new contact information.

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