



OREGON
WINE
BOARD

ANNUAL REPORT

2016-2017

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LETTER FROM YOUR CHAIRMAN

With the Oregon wine industry now in its sixth decade, the Oregon Wine Board continued its impressive momentum during the 2016-17 fiscal year with industry-supporting programs in each of its key focus areas: marketing, education and research.

The recently completed year was among the most productive and rewarding to date through the introduction of new programs and taking current activities to new levels. It was gratifying to serve as chairman of OWB and see our programs make a real difference in the sales and reputation of Oregon wine. This report outlines many of those successful efforts, and I urge you to read the entire report for more detail.

I want to assure you that we are moving the needle. As I traveled the country and internationally in 2017 I saw many examples of new market achievement and recognition for Oregon wine. Current market data also validate our strategy and execution of the kinds of programs that support this direction.

Sales of Oregon wines are expanding domestically, internationally and directly at a rate exceeding all other U.S. wine regions. Just a few weeks ago, we received a report from Nielsen showing that sales of Oregon wine during the 12 months ended July 2017 were up 17% from the previous year. That compares to a total national wine sales increase of 2.8%. With Nielsen's focus on store shelf movement, it is an important bellwether for consumer acceptance at the grassroots level. Additional data from other sources validate that Oregon wine is winning at the higher end in restaurant wine sales and direct to consumer sales at the winery door as well.

Briefly, I'd like to touch on just some of the many initiatives during the past year that helped achieve our overall goals of consumer visibility, trade engagement, industry education and research to improve productivity and product quality.

Marketing

The Oregon Wine Resource Studio was launched in August 2016. This web-based sales and training resource for the Oregon wine industry was the result of the wine community working together and thinking outside the box to address a need. It is a tremendously valuable and vibrant tool for the industry.

In spring 2017, we partnered with GuildSomm to produce a podcast featuring Oregon's winegrowing regions. It's long been a goal to increase our ties with this important audience of wine professionals who play such a critical role in recommending Oregon wine.

In May 2017, 40 Masters of Wine from all over the world came to Oregon to experience our industry over three outstanding days.

Education

Our annual Oregon Wine Symposium is always a time for our industry to come together to learn, network, celebrate and honor important achievements of the past year. With record attendance of 1,500, it was the largest wine industry event in the Northwest. In 2017 we have been fortunate to add a Master of Wine to lead our education efforts.

Research

The efforts we make in research do not always grab headlines, however they provide the foundation that helps ensure the sustainability of our quality statement. Last year, we significantly increased our investment in research to make better wine while improving yields and productivity. After many years exploring a broadening of our research to the business and economics of wine production, OWB issued its first request for proposals in this area.

Finally, I want to thank my dedicated board colleagues and the hardworking and creative OWB management team. And, of course, the industry itself. We are blessed with an amazing community, focused on enhancing the outstanding quality and reputation Oregon wine has achieved over the years. As you can see, it has been a very productive and successful year for Oregon wine and we have great momentum and tremendous opportunity before us. In the next year the OWB will continue to grow and shape Oregon's global demand while helping enhance the business success of each and every winery through focused marketing, education and research.

Cheers,

Steve Thomson | Cristom Vineyards | Chairman, Oregon Wine Board

“Consumers need no longer worry about whether or not this year, or any year, was a “good” year [in Oregon]. Because in every year good, sometimes great, wines are made.”

- PAUL GREGUTT
WINE ENTHUSIAST
FEBRUARY 2017

MARKETING AND COMMUNICATIONS

Marketing and communications programs are designed to promote broader availability of Oregon wines, drive higher awareness of Oregon’s exceptional wine quality, generate wine tourism and enhance the value of Brand Oregon. Here are summaries of key initiatives aimed at achieving these goals.

To streamline communications efforts to the industry, OWB launched the Information Sharing Task Force. This initiative enables two-way dialogue between the OWB, all of the state’s AVAs, and each winery and vineyard within.

Oregon Wine Touring Guide

The second annual Oregon Wine Touring Guide was published in February 2017. This edition was expanded in page count by 10% to accommodate additional editorial and map pages; and print volume by 20% to enable a greater geographical footprint. The guide’s 88 pages offer new photography, itineraries and feature content, supplemented by redesigned regional maps and more than 500 tasting room listings across each of Oregon’s unique wine regions. The guide’s story content was designed to educate and inspire visitors and locals alike, while the itineraries, maps and listings enable those inspired to experience Oregon wine in tasting rooms and restaurants around the state.



The guide is available free of charge to individuals and businesses. By the end of June, 193 Oregon wineries and businesses had [requested a bulk shipment](#) and individual consumers in 49 states [requested a copy](#). When combined with OWB’s regional distribution partner, more than 45,000 copies of the original 60,000 print order had been distributed. Additionally, the guide is always available to view and download [online](#). Since publication, the 2017 digital guide has been viewed more than 3,100 times for an average duration of just over 9 minutes.

Online Tasting Room Listings

The OWB’s newest tourism resource is an [online trip planning tool](#), hosting more than 500 tasting room listings. Launched in February 2017, this resource offers consumers a robust overview of statewide tasting rooms with detailed listings searchable by nearly 50 parameters. Consumers can search and sort listings by region and grape variety, as well as more than a dozen unique amenities, such as dog friendliness, bus/RV parking, outdoor seating, electric vehicle charging and more. Additionally, users can bookmark favorites and see all tasting rooms mapped with location and contact information. Users have generated more than 8,500 pageviews through June.

Each tasting room listing also serves to collect business data for the OWB’s internal industry database. This dual function was designed to allow businesses to update their information in real time, ensuring more frequent and more accurate updates to the OWB database, a critical resource for OWB’s communication and service to the industry.

[Access the toolkit](#) for instructions on how to claim or create a tasting room listing.

Oregon Wines Fly Free

Supported by an Oregon Wine Country License Plate grant, and in partnership with Travel Oregon, Willamette Valley Visitors Association, Southern Oregon Visitors Association, Mt. Hood and the Columbia Gorge regional association, and the Tualatin



Valley Visitors Association, the OWB executed an Oregon Wines Fly Free (OWFF) promotional sweepstakes from August through October 2016. Two grand prizes — round-trip tickets to Oregon on Alaska Airlines, three nights in wine country and dinner for two at an Oregon Wine A-List restaurant — were awarded. The campaign was designed to increase awareness of the Oregon Wines Fly Free program and to build OWB’s consumer audience. The promotion resulted in 2.3 million online impressions, drove more than 17,000 visits to www.oregonwine.org and increased the Oregon Wine Facebook page “likes” by 4,275. In addition, more than 800 consumers were added to the OWB’s database for future outreach.

In March 2017 the OWB, along with our partners at Travel Oregon and Alaska Airlines, renewed the OWFF program — the only statewide program of its kind — through March 2019.

The OWFF program incentivizes key consumers to visit tasting rooms and purchase wine. Approximately 325 wineries representing all of Oregon’s winegrowing regions are enrolled in the OWFF program.

Oregon Wine Month

May 2017 marked the sixth annual Oregon Wine Month celebration. Building on the success of past years, a photo-centric campaign featured five Oregon chefs, each of whom created a recipe to pair with one of Oregon’s top five wine varieties.

The campaign generated more than 2 million consumer impressions across a targeted social, digital and radio media plan, with an additional 20 million impressions generated through social channels organically. A news release was distributed in late April, with 20 articles calling out Oregon Wine Month for a combined reach of more than 14.7 million earned impressions.



OWB created an [online marketing toolkit](#) for winery staff, distributors and buyers to use in leveraging Oregon Wine Month across their own sales and communications channels. The toolkit generated more than 1,700 pageviews. Point-of-sale kits were shipped by request to 131 tasting rooms across the state, an 18% increase in participation. There were 315 events posted to the calendar hosted on oregonwine.org, which enjoyed a 31% annual increase in pageviews during the campaign period of April and May. The consumer sweepstakes garnered more than 16,000 entries, increasing OWB’s database of consumers that have agreed to receive communications about Oregon wine via the Oregon Wine Insider consumer newsletter by 142%.

Oregon Wine Month 2017 employed multiple channels to drive wine sales. To encourage on-premise engagement with Oregon Wine Month, OWB partnered for a second year with OpenTable. A majority of participating restaurants offered a flight of three

Oregon wines throughout the month. Competitions were conducted among wine stewards at five major retail chains, driving creative displays featuring a broad range of Oregon wines. Point of sale materials were delivered to 34 distributor locations to support in-market activity. Finally, wineries throughout Oregon took advantage of the program to help drive direct-to-consumer sales, with 14 marketing association groups conducting events coinciding with Oregon Wine Month.



“Many other wine regions around the world have staked their claims as suitable homes for pinot noir. Not all have been consistently successful, but the Willamette Valley of Oregon, in its roughly 50-year history as a wine region, has proved to be one of the best.”

- ERIC ASIMOV
THE NEW YORK TIMES
SEPTEMBER 2016

“With a superb trio of consecutive vintages [2014, 2015, 2016], you can buy Oregon’s wines with little hesitation over the next few years.”

- JAMES SUCKLING
ASIA TATTLER
NOVEMBER 2016



Oregon Wine A-List Awards

The Oregon Wine A-List Awards recognizes restaurants that exhibit exceptional support for Oregon wines as demonstrated by depth, breadth, prominence and presentation on their lists. The A-List Awards aims to increase sales of Oregon wine within restaurant programs by engaging with restaurant wine buyers and sommeliers, providing public recognition to Oregon wine’s biggest advocates and driving consumers to Oregon Wine A-List restaurants.



The 2017 list recognized 124 restaurants, up 11% from 2016. Nine restaurants were denoted as Regional Spotlight Award winners. The program’s top honor, Wine Program of the Year, was announced and celebrated at the Oregon Wine Symposium. Ava DeRosier was recognized for her deep commitment to Oregon throughout her tenure as the director of food and beverage at Larks Home Kitchen Cuisine and the Neuman Hotel Group.

In September 2016, the OWB participated in Feast Portland’s Smoked!, a marquee event attended by 2,160 consumers, chefs, media and industry members. The OWB booth featured Chef Daniel Mondok of Portland restaurant Raven & Rose serving four signature hors d’oeuvres each paired by sommelier Dave Shenaut with Oregon wines from around the state.

Oregon Wine Resource Studio

In August 2016, the Oregon Wine Board launched the [Oregon Wine Resource Studio](#), an innovative sales and training resource developed for members of the Oregon wine industry and those who support it. This new mobile-friendly website contains a comprehensive suite of information and assets that illustrate the distinctive aspects of terroir, history and culture that combine to make Oregon a world-class winegrowing region. The content was developed in partnership with industry experts, including historians, geologists and a climatologist, as well as representatives from each of the state’s 18 AVAs. Free downloadable and customizable presentation materials enable anyone to learn about, train others and sell Oregon wine.



From launch through June 2017, there were 30,000 pageviews by 7,000 unique users spending an average of 2:41 minutes per session. About 90% of site traffic is from the United States with the balance coming primarily from Canada, the United Kingdom, Mexico, Australia, Italy and Japan. About 750 unique users have downloaded a total of 6,000 files.

The Resource Studio was refreshed in November 2016 and February 2017 with updated statistics, maps and presentations. Development of the Oregon Wine Resource Studio was funded by a Specialty Crop Block grant from the USDA.

GuildSomm Partnership

In spring 2017, OWB partnered with GuildSomm, a nonprofit international membership organization for sommeliers and wine professionals, to produce an hour-long podcast and a 10-minute video featuring winegrowing regions in Oregon. The GuildSomm team of three, including Geoff Kruth MS, traveled through the Columbia Gorge and Willamette Valley, and made their inaugural trip to Southern Oregon.

“A Tour of Oregon” GuildSomm podcast episode is now available to listen to on the

GuildSomm website, Vimeo, YouTube and iTunes. The podcast is also available on the [Oregon Wine Resource Studio website](#). It has been heard more than 57,000 times by members of the trade from around the world. The video will be released in fall 2017.

National Consumer Market Research Study



OWB commissioned Full Glass Research to conduct a survey to further understand purchasing habits, buying influences and perceptions among the segment of fine wine consumers who purchase 85% of wines priced more than \$20 at retail. This consumer base is comprised of approximately 10-12 million adults in the U.S. who consume wine more than once per week and purchase wine priced at more than \$20 at least monthly. The study included 532 consumers from around the country, who are part of the Wine Opinions survey panel. It examined

differences between Oregon's core consumer fan base and those who are casual Oregon wine consumers, looked at Oregon's most compelling and ownable attributes as a growing region, and investigated barriers and opportunities to deeper engagement with Oregon wine. Watch the webinar and download the full report [online](#).

Media Relations

With industry survey results pointing to media relations as the number one opportunity for Oregon's winemakers and producers, the OWB continued its push to place Oregon at the forefront of the media spotlight with wine quality messaging leading the charge.

In addition to meetings with press at industry events such as the Oregon Wine Symposium, Oregon Pinot Camp and concentrated outreach, a media tour was conducted in summer 2016, which had influential media members tasting through offerings from 44 Oregon wineries with a stopover at the International Pinot Noir Celebration. In June 2017, OWB hosted Christy Canterbury MW, a journalist, speaker and wine judge, who visited with representatives from 26 Oregon wineries, tasting wines spanning six distinct AVAs. Also in June, OWB coordinated a visit with Lisa Perrotti-Brown MW of The Wine Advocate as she prepared her Oregon report.

Stories on Oregon wine garnered more than 9.8 billion impressions this past year with more than 12,000 articles mentioning Oregon wines, equating to an equivalent purchased advertising value exceeding \$213 million, according to Meltwater analytics.

Wine publications that covered Oregon wines included, but are not limited to, Oregon Wine Press, Wine Industry Advisor, Food & Wine, Wines & Vines and Wine Enthusiast. Travel titles included TravelAge West, Conde Nast Traveler, Frommer's and Lonely Planet. Local market media sources spanned the U.S. and included The Oregonian, Boulder Daily Camera, Charleston City Paper and City Guide NYC. National heavy hitters included Self.com, Parade Magazine, Forbes and The New York Times.

International Marketing

Market Access Program (MAP) funds along with other grants from the U.S. Department of Agriculture provide the funding for OWB's international marketing activities. OWB partners with the Washington State Wine Commission through



"It seems clear to me that Southern Oregon is the right climate for producing top grade Rhône reds."

**- NEAL MARTIN
THE WINE ADVOCATE
JULY 2016**

“For me, the most distinctive terroir in America is one of the newest AVAs: The Rocks District of Milton-Freewater. The wines from these vines, planted on dramatically stony soils, sing a whole chorus of unmistakable aromatics and flavors, and make some of the greatest wines in America.”

- HARVEY STEIMAN
OF WINE SPECTATOR
IN OREGON WINE PRESS
JUNE 2017

the Northwest Wine Coalition (NWC) to fully leverage these funds by sharing market agents, event costs and travel expenses. NWC also partnered with the California Wine Institute in March 2017 to host the successful Go West trade tasting events in Stockholm. In addition, a first-ever collaboration with the California Wine Institute and New York Wine & Grape Foundation resulted in a new USDA grant for a four-state tour for sommeliers from Canada. This inbound trip was such a success the grant was renewed for a second year, with a focus on the Danish market in October 2017.

Eleven Oregon wineries participated in ProWein in Düsseldorf, which put Oregon wines on the world stage alongside the most prestigious winegrowing regions. In addition, NWC held trade tastings in London, Tokyo, Osaka and Seoul, which often included a trade seminar to boost knowledge of Northwest wines. The London market also included a new evening event called Magnum Opus, held at the Churchill War Rooms after the trade tasting. This was an opportunity for additional interaction with top trade and media. Wineries poured from magnums in a more informal format.

The OWB hosted its first Oregon-only international marketing event in years, visiting Toronto with 45 wineries. The event took place in April and attracted more than 350 top-level trade and media in the Ontario market.

Additionally, for the first time in more than 15 years, OWB had the honor of hosting a group from the International Masters of Wine comprised of 40 MWs from around the world. The May 2017 tour took them from the Walla Walla Valley through the Columbia Gorge to the Willamette Valley. At each stop along the way, the group was exposed to an in-depth tasting and educational experience of the state's major winegrowing regions, including an evening in Portland with Southern Oregon winemakers. The potential for extended impact of these efforts is exemplified in participant Peter Marks MW's comments: "Thank you so much for organizing and hosting our amazing trip! I learned so much more about Oregon wines, and I am excited to pass those lessons on to others."

OWB also sponsored inbound visits for influential wine trade from its international target markets. Partnering with recognized programs such as Oregon Pinot Camp (OPC) provided ideal opportunities to present Oregon to the world and create life-long Oregon wine ambassadors. In June 2017, OWB brought 19 key trade influencers from Canada, Denmark, Japan, Korea, Sweden and the U.K. to attend OPC. Their visit was preceded by a tour of the state in order to learn about and experience the range of outstanding wines made throughout the state.

EDUCATION

Educational programs are designed to inform members of the Oregon wine community about technical research and business insights that can improve their grape farming, winemaking and management practices.

Oregon Wine Symposium

The 2017 Oregon Wine Symposium attracted 1,500 participants generating excitement around the largest wine industry event in the Pacific Northwest.

The event continues to develop and deliver topics that are important and timely for the industry. The Oregon Wine Industry Awards Luncheon recognized industry members and supporters before their peers. It was a special privilege to present Sue Horstmann, executive director of the Willamette Valley Wineries Association, with the Lifetime Achievement Award for her outstanding effort to promote and advance the largest AVA in Oregon. Read more about all the [2017 honorees](#).

The Symposium also included the Soirée, an evening event on the trade show floor that connected more than 175 businesses that support the industry with winery attendees in a fun, relaxed atmosphere. Oregon wines from around the state were featured.

Materials from the exceptional presenters and panelists from around the world, including session presentations, handouts and select videos, are available [online](#).

Workshops and Webinars

The Oregon Wine Board offered several in-person and online educational programs in addition to the annual Symposium.

Between August and November, the Oregon Wine Board's education and marketing staff toured all major winegrowing regions in Oregon to launch the [Oregon Wine Resource Studio](#). In partnership with Lunabeen Media, the team delivered seven hands-on marketing workshops, coaching for 167 industry members on how to effectively use the materials within this new website to tell their stories, and cultivated more knowledgeable and effective brand ambassadors. The workshops garnered average attendee satisfaction scores of nine out of 10. This initiative was funded in part by the Specialty Crop Block grant that enabled creation of the Resource Studio.

In January, OWB hosted a webinar to accompany the consumer market research study of ultra-premium wine consumers in the U.S. Christian Miller of Full Glass Research presented his findings on segmentation based on consumption patterns of Oregon wines among this audience. Registrants totaled 103 industry members, with an additional 75 online views. OWB also offered a webinar on how to best engage with Oregon Wine Month, which included training on how to use the Oregon Wine Month toolkit and actionable strategies for increasing sales and program engagement, which attracted 93 registrants and 128 additional online views. All webinar presentations and recordings can be found in the [Resources](#) section of the Oregon Wine Board's Industry website.

RESEARCH

The Oregon Wine Board has a strong commitment to support research and develop new knowledge that can be used to solve issues and problems in the Oregon wine industry. OWB's response to that commitment is demonstrated by:

- its financial commitment;
- its constant search for new research funding;
- its administrative commitment to supporting the Oregon Wine Standing Committee on Research (OWSCR);
- the impressive work of the OWB's Research Committee, chaired by OWB director John Pratt.

With the active involvement of a wide spectrum of Oregon's wine industry professionals, the OWB set its research priorities for the 2016-17 year. These priorities included a strong emphasis on the new viral disease GRBaV (grapevine red blotch-associated virus, or "red blotch" for short), grapevine nutrition, and the organoleptic consequences of various crop loading strategies and stressed vine syndrome, among others.

For several years, the wine industry has encouraged both OWB and the Oregon



"...the Willamette Valley is a place where the pinot noir ideals of finesse and grace can be consistently met, even in entry-level wines."

- ERIC ASIMOV
THE NEW YORK TIMES
OCTOBER 2016

“Winemakers in the state of Oregon ... are making some of the most exciting pinot noirs in the world. The wines, which can emulate the best of Burgundy, have a unique purity of fruit due to the coastal state's cool climate.”

– JAMES SUCKLING
 JAMESSUCKLING.COM
 MAY 2017

Wine Research Institute (OWRI) to explore the possibility of research projects centered around the industry's economic and business concerns. Over the past several years, both organizations have explored this idea through OWSCR and directly through OWB. Several economic studies are now under way through OWRI, and OWB has issued its first RFA for business and economic research. The first of such awards is expected to be made in the 2017-18 fiscal year.

OWB continues its annual survey of the size and productivity of the Oregon wine industry. Through data gathered by the Southern Oregon University Research Center (SOURCE), OWB published its [2016 Vineyard and Winery Report](#), a critical reference document about the industry's vitality in a variety of settings.

The vigor of OWB's research program is demonstrated by the outstanding list of research projects shown below. The summaries of the research accomplishments of these projects can be found [online](#).

- Paul Schreiner, Research Plant Physiologist, USDA-ARS and Oregon Wine Research Institute: *Comparing Nitrogen Fertilization in the Vineyard versus Supplementation in the Winery on Quality of Pinot noir and Chardonnay Wines and Productivity in the Vineyard*
- Vaughn Walton, Associate Professor, Horticultural Entomologist, Department of Horticulture, Oregon State University: *Integrative Studies of Vector-related Field Epidemiology for Grapevine Red Blotch-associated Virus and Grapevine Leafroll-associated Virus in Oregon*
- Walter Mahaffee, Research Plant Pathologist, Horticulture Crops Research Laboratory, USDA-ARS: *Grape Powdery Mildew Management – A Fungicide Timing and Selection Conundrum*
- Patty Skinkis, Associate Professor and Viticulture Extension Specialist, Department of Horticulture, Oregon State University: *Understanding the Yield-Quality Relationship in Cool Climate Pinot noir and Chardonnay Production*
- James Osborne, Extension Enologist, Department of Food Science and Technology, Oregon State University: *Impact of Pre-fermentation Cold Soak Conditions on Microbial Populations and Consequences for Wine Aroma*
- Michael C. Qian, Professor, Department of Food Science and Technology, Oregon State University and Oregon Wine Research Institute: *Identifying Compound(s) Responsible for Off-flavors Associated with “Stressed Vine Syndrome” in Pinot noir*
- Laurent Deluc, Assistant Professor, Grape Research, Department of Horticulture, Oregon State University: *Determining the Role of Auxin-Response Factor 4 in the Timing of Ripening Initiation in Vitis vinifera*
- Michael Lentz, Associate Professor, Department of Biology, University of North Florida: *Molecular and Biochemical Analysis of Phenolic Acid Decarboxylase from Brettanomyces Yeast Isolates*

FINANCIALS

The OWB's largest funding source, Grape Assessment income, held steady at \$1.7 million, allowing OWB committees, staff and directors to continue the development of marketing programs, research grant awards and educational offerings.

Expenses came in higher than expected for the production of the annual Oregon Wine Symposium, but the additional investment allowed OWB to make full video recordings of all sessions available to the industry, expand the Soirée on the trade show floor and continue to bring in influential speakers from France, New Zealand and California.

The OWB postponed the cross-border media tour to later in the calendar year, bringing the communications expenses down 18%. The majority of expenses associated with the international marketing activities (totaling \$558,500) are covered by various federal grant programs, including the Market Access Program (MAP). The remaining expense of \$117,000 is partially offset by winery participation fees.

Much of the marketing program budget was invested in advancing Oregon Wine Month, developing collateral such as the Oregon Wine Touring Guide and the online tasting room directory, and important market research.

Grant funds from the USDA Specialty Crop Block and the Oregon Wine Country Plates programs were used for the hosting of the Masters of Wine tour and a consumer-facing digital marketing campaign.

In order to supplement industry funds, the OWB successfully gained an expanded number of federal and state grants. During the past year, these funds totaled more than \$700,000.

A close-up, profile view of a woman with long, wavy blonde hair. She is holding a wine glass to her nose and inhaling, her eyes are closed in concentration. The background is blurred, showing other people and what appears to be a wine event setting.

“I have become increasingly enthused by Oregon’s performance with Syrah, especially because so many of the wines are being made with a strong nod to the northern Rhône.”

- JOSH RAYNOLDS
VINOUS
JANUARY 2017

“For the outstanding quality of its wines, the resulting international recognition and the tectonic shifts in wine investments these have engendered, Wine Enthusiast is pleased to name Oregon’s Willamette Valley as its 2016 Wine Region of the Year.”

- PAUL GREGUTT
WINE ENTHUSIAST
NOVEMBER 2016

INCOME	BUDGETED	ACTUAL
Grape Assessment (\$25/ton)	1,500,000	1,771,079
Wine Tax (2¢/gal)	310,000	319,367
Symposium & Workshops	255,000	248,351
International Marketing Fees	45,000	29,808
Grant Funding	116,150	153,332
Other Income	11,100	2,908
Total Income	2,237,250	2,524,845
EXPENSE	BUDGETED	ACTUAL
Research		
Viticulture & Enological Research Grants	350,800	350,760
Vineyard & Winery Survey	70,000	69,779
Business Research	40,000	-
Employee Compensation	20,000	17,649
Total Research	480,800	438,188
Education		
Symposium	290,000	313,947
Seminars & Webinars	30,000	14,012
Administration	4,000	4,309
Employee Compensation	78,000	76,637
Total Education	402,000	408,903
Marketing & Communications		
Communications (Media Relations)	173,000	140,702
International Marketing (Trade Tastings/Seminars)	228,000	229,690
Event Marketing (OWM/OWFF/A-List)	250,000	191,511
Marketing Collateral (Touring Guide)	121,133	114,593
Marketing Research	50,500	49,914
Administration	8,000	15,782
Employee Compensation	220,000	221,995
Total Marketing & Communications	1,050,633	964,187
General & Administration		
Board Administration	15,000	24,813
Grant Writing (SCBG/WCLP)	10,000	-
Program Sponsorship	20,000	1,000
Office Administration	105,000	122,239
Staff Administration	55,000	79,740
Employee Compensation	510,000	502,582
Total General & Admin	715,000	730,375
Total Expense	2,648,433	2,541,653

**Proforma income and expenses*

BOARD OF DIRECTORS



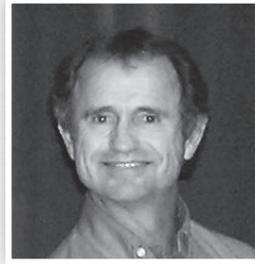
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THANK YOU TO ALL OF OUR VOLUNTEERS.

All this work would not be possible without the countless unpaid hours of dedicated time.

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Michael Claypool, Clay Pigeon Winery
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