

2018-2019

# ANNUAL REPORT



OREGON  
WINE  
BOARD

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# LETTER FROM YOUR PRESIDENT

This past year was like few others in Oregon wine industry history.

New opportunities and pressures presented themselves as Oregon continued to attract extraordinary attention from trade partners, wine critics, investors and consumers around the world.

*Wine Spectator* editor Tim Fish summed it up accurately, writing: “Oregon is the most dynamic wine region in the U.S. right now.”

To leverage and extend that reputation, the Oregon Wine Board’s education, communications, research and marketing activities were again focused on helping grape growers and winemakers adapt to an evolving, more intensely competitive environment while discovering the unique potential in their businesses.

Important milestones from 2018-19 included a new attendance record for the Oregon Wine Symposium, the global launch of an online trade curriculum branded Learn Oregon, fresh insights about our wine tourists, and more effective integration with Travel Oregon’s new consumer trip-planning platform. We also choreographed comprehensive itineraries for media guests and carefully-chosen international buyers to introduce them to the compelling range of wines spread across the state’s 19 AVAs. And we forged new alliances, including one with our counterparts from New Zealand to jointly design and deliver an historic education event for New York trade and media.

Equally important, your Board looked towards the future by investing an all-time record amount in viticulture and enology research. We also sponsored extensive statewide tours during which we invited your perspective and guidance on how best to allocate the industry’s resources for maximum impact in scientific research and marketing. Your input and advice helped the Board define, refine and embrace new strategic plans in those two critical functional disciplines that will guide OWB investments and programming.

The following pages provide additional details on the programs enabled by industry tax dollars, supplemented by grant awards, along with the results they delivered.

On behalf of the Oregon Wine Board Directors and management, I want to thank you for your suggestions and feedback during the year. Please feel free to contact us anytime with additional ideas and comments on how we can more effectively support your family’s business.



Tom Danowski, President

In summer 2018, the leadership of the OWB Marketing Committee identified the need for an updated strategic plan to guide the Marketing and Communications (MarComm) pillar of the OWB's work. With the goal of crafting a new vision and defining areas of strategic priority for MarComm, a committee of nine industry leaders was formed. Their work over a nine month period included envisioning the future landscape in which Oregon wines will compete, understanding the needs of the diverse industry statewide, and investigating the characteristics that combine to create the unique brand of Oregon Wine.

Throughout the process, the Strategic MarComm Committee solicited feedback from the industry and heard from 230 people around the state in a series of eight face-to-face listening sessions and an online survey. Subject matter experts in the fields of consumer marketing and tourism, trade relations, and media relations were also gathered together for deeper consultation. The feedback and insights were brought to a planning summit in May at which the committee members agreed on four areas of strategic priority and a new vision for OWB's Marketing and Communications program.

## OWB MARKETING & COMMUNICATIONS STRATEGIC VISION & PRIORITIES

**VISION:** OWB's Marketing & Communications program will cement Oregon as an essential selection for fine wine enthusiasts and professionals worldwide by championing demand-led growth for the long-term viability of Oregon's wine industry.

### STRATEGIC PILLARS:

**BRAND  
EQUITY**

Elevate the esteem of the Oregon Wine brand globally

**MARKET  
EXPANSION**

Build multi-tier trade demand to generate growth opportunities

**WINE  
TOURISM**

Champion high value, engaged and sustainable wine tourism statewide

**INSIGHTS &  
INTEGRATION**

Enrich industry intelligence, dialogue and alignment

While the management team is in the early stages of adapting its activity plans to meet these needs, the past year's work will be presented within this new framework to show how progress is already being made in these priority areas.

## STRATEGIC PILLAR 1: BRAND EQUITY

ELEVATE THE ESTEEM OF THE OREGON WINE BRAND

# MEDIA RELATIONS

OWB's media relations program plays a crucial role in elevating the esteem of Oregon wine and keeping it top of mind among consumers and trade alike.

### **Inbound Tours and Hosting**

The 2018-19 calendar kicked off in July with the annual statewide summer media tour, commencing in Southern Oregon with five journalists. The group ventured through the Rogue Valley and Umpqua Valley AVAs for three days, to the Willamette Valley for the International Pinot Noir Celebration, and ended in Portland with an urban winery tour. Ten stories with unique angles appeared in Tasting Panel Magazine, The Seattle Times, Washington Wine Blog and SOMM Journal. The stories reached over 9 million readers, helping cement Oregon's reputation among wine lovers and trade professionals for being sustainably produced and serving as an excellent partner to good food.

In February, media support continued for the Oregon Wine Symposium, including a pre-launch tasting of Oregon Solidarity rosé. The story of Oregon Solidarity, a collaborative effort between Willamette Valley Vineyards, King Estate, Silvan Ridge and The Eyrie Vineyards in making a trio of wines from rejected Rogue Valley grapes, had tempted the media who had yet to taste the final product. OWB hosted a sneak peek at the Symposium's Soirée, which



*Oregon Solidarity Rosé at the Oregon Wine Symposium in February*

made a big impression among press and industry. Michael Alberty wrote in *The Oregonian*: “I tasted the rosé of Pinot noir straight off the bottling line at Willamette Valley Vineyards ... Cooperation tastes mighty fine. I can’t wait to try the next two examples of Oregon Solidarity.”

On each of the two nights of Symposium, OWB partnered with Travel Oregon for two media/winemaker dinners. The first, a European farm dinner with Southern Oregon, Columbia Gorge and Walla Walla Valley wineries was attended by 13 writers from publications including *Imbibe Magazine*, *Oregon Wine Press*, *Wines & Vines, Inc. Magazine*, *Fast Company*, *SevenFifty Daily*, *Alaska Beyond Magazine* and *Wine Industry Advisor*. The second dinner featured the Oregon Solidarity winemakers with attending media including the *Statesman Journal*, *Eater Portland*, *Napa Valley Register* and *Portland Mercury*. The dinners resulted in numerous social media posts, an article in Travel Oregon’s newsletter reaching 125,000 people, and a cover story in the *Statesman Journal*.

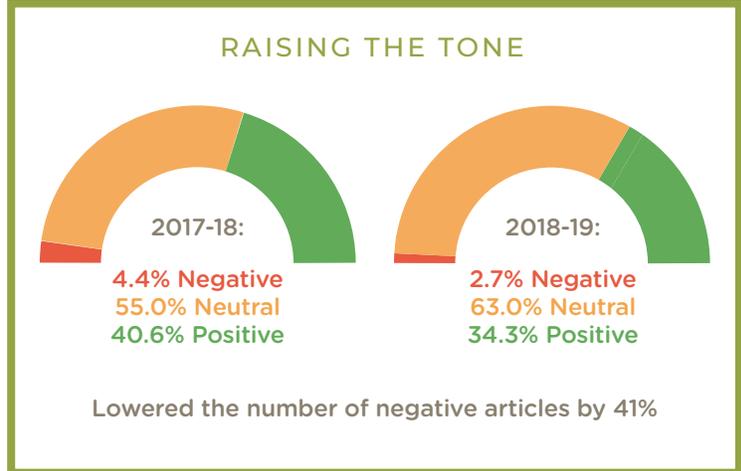
May saw the third Cross Border AVA media tour, a partnership between the OWB and the Washington State Wine Commission. Four media guests hailed from Los Angeles, North Carolina and Portland, representing publications such as *Vino-Sphere*, *SevenFifty Daily*, *TableConversation.com*, *1859 Magazine*, *The Washington Post*, *Medium* and *Salon*, among others. This prolific bunch of writers have filed 11 stories so far based on their experience tasting wines from 34 producers that spanned nine AVAs.

In Portland in June, OWB participated in Travel Oregon’s first-ever “media marketplace” event, which featured a speed-dating format that connected Regional Destination Management Organization representatives with writers. Local freelancers were the target, and more than 40 media were in attendance. OWB secured wines from seven wineries to show how well Oregon wines pair with local food.



*Instagram images from Cross Border AVA media tour*

**2018-19 Coverage Review**



Source: Meltwater

**Wine Reviewers**

**ROBERT PARKER WINE ADVOCATE**

The report following the June 2018 visit from Erin Brooks, Robert Parker Wine Advocate’s Oregon reviewer, was published in August. Of the more than 1,000 Oregon wines reviewed across 15 AVAs, 51% received 90+ scores. The report also awarded its highest-ever score for an Oregon Chardonnay, with the 2016 Minimus Chardonnay 1984 Stein Vineyard commanding 97+ points.

**JAMESSUCKLING.COM**

James Suckling’s Oregon reviewer, Nick Stock, came to Oregon twice during the year, and two reports were published. After his second visit, Nick wrote: “It should come as no surprise the wines once again delivered a strong unified impression of rich flavors, structure and balance.”

Both of Nick’s reports presented good results. The first visit resulted in 92% of the 406 Oregon wines reviewed garnering a score of 90 points or more, while for the second visit that number soared to 97% of the 451 wines reviewed. Also notable was that an Oregon wine was given 99 points by the publication for the first time: Antica Terra’s 2016 Antikythera Pinot noir from Eola-Amity Hills.

# OREGON WINE MONTH

In its eighth year, [Oregon Wine Month](#) created a period of celebration for the Oregon wine industry, its fans and those who support it. Beginning in March and running through May, the OWB executed its most concentrated period of paid consumer communications, provided wineries a platform by which to amplify their offerings, and presented trade partners with an incentive to build the Oregon wine category. The goal this year was to focus resources on the most historically successful elements to deliver a robust program as efficiently as possible. Program spending was reduced by 38% compared to 2018.

## Paid Media

New for 2019, OWB engaged *The Oregonian*/OregonLive.com as its principal media partner. The partnership opportunity presented a compelling combination of breadth, reaching all corners of Oregon, and depth, enabling sophisticated audience targeting.

The campaign with *The Oregonian* generated more than 3.5 million impressions and drove more than 55,000 website sessions directly to Oregon Wine Month-related pages. Importantly, the most critical pages—the May event calendar, restaurant promotions and the homepage—saw a traffic increase of 33% compared to last year.

The annual Oregon Wine Month collaboration with Travel Oregon for social media support and native wine tourism content hosted on TravelOregon.com generated another 1.2 million impressions among a pre-qualified audience of Oregon fans.

Paid and owned media promoting the annual Oregon Wine Month sweepstakes resulted in more than 26,000 actions from 7,335 unique entries. Of those, 5,133 were new contacts added to the OWB's consumer newsletter for ongoing communication.

## Earned Media

To help generate earned media, a press release was circulated to 170 writers and wine industry members. This effort resulted in hundreds of electronic and broadcast stories, including placements in Sip Northwest and Wine Industry Advisor as well as a number of consumer-facing blogs. In addition, OWB



assisted the Oregon Wine Press in putting together their [May cover story](#) about what Oregon Wine Month means to winemakers across the state.

### **Industry Support and Participation**

To make participation as easy and fruitful as possible, an [online toolkit](#) was provided to winery staff, distributors and buyers to leverage Oregon Wine Month across their own sales and communications channels. OWB also hosted an industry webinar to share the program's details and assets. The industry toolkit served more than 2,300 page views in the lead-up to May.

Points of sale materials were also available for digital download or physical order on the toolkit. A printed suite of three posters, five table tents and 10 bottle neckers was shipped to 87 wineries around the state.

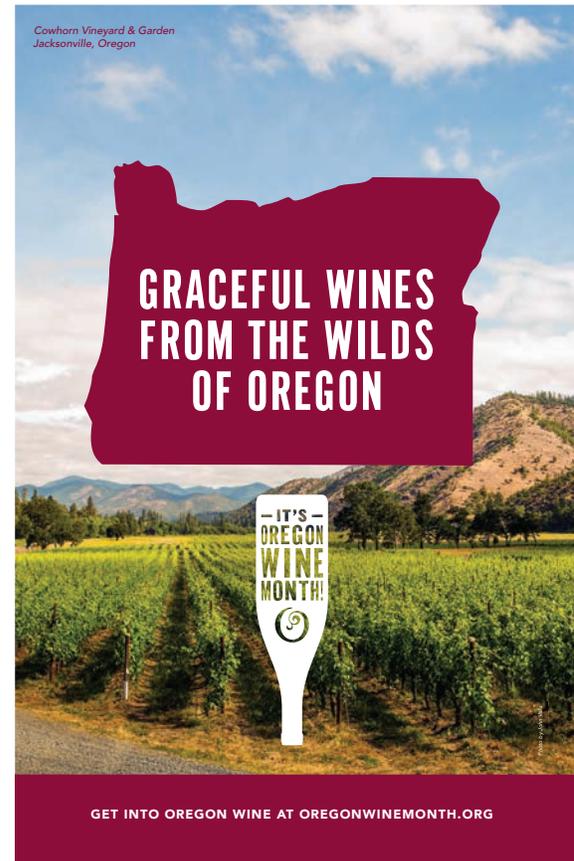
### **Trade Support and Participation**

New this year, OWB offered distributor incentives in Boston, an important market for Oregon. Sales reps for the two participating distributors, which together represent 77 Oregon wine brands, had the opportunity to win a cash incentive and Oregon Wine raincoat. The program resulted in a 26% lift in Oregon wine sales over a 60-day period for one distributor and a 12% lift year-over-year for the other.

OWB continued to print and ship complimentary point of sale materials to distributors by request, and shipped packages to 40 distributors in 16 states.

To encourage on-premise engagement with Oregon Wine Month, any restaurant that signed up to offer a flight of three Oregon wines was promoted on the OWB's website and through paid media channels. More than 80 restaurants around Oregon participated.

In the off-premise channel, a competition was conducted among wine stewards at Safeway branches throughout Oregon, driving creative displays featuring a broad range of Oregon wines. To get Safeway wine stewards geared up for Oregon Wine Month, an Oregon Wine master class was delivered at their all-hands-on-deck meeting in April.



*Oregon Wine Month 2019 poster*

# CONSUMER COMMUNICATIONS

OWB communicates about its programs and offerings as well as industry events and other relevant news to a wide consumer audience using a variety of owned channels. A range of compelling content is hosted on [www.oregonwine.org](http://www.oregonwine.org), and a digital trip-planning tool is offered at [visit.oregonwine.org](http://visit.oregonwine.org). The latter site houses more than 500 tasting room listings, making it easy for users around the world to plot itineraries by geography, grape variety, region and dozens of other filters. More than 36,000 wine drinkers can be counted across OWB's Facebook, Instagram and Twitter accounts, and the OWB's consumer database is nearly as large with more than 34,000 Oregon wine fans who receive email from OWB about twice each month.

## CONSUMER WEBSITE TRAFFIC BY THE 2018-19 NUMBERS

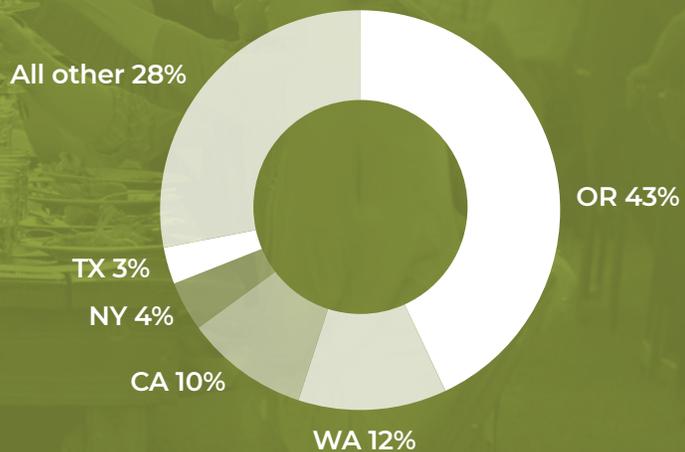
**104,451**  
unique users

**254,743**  
pageviews

**138,824**  
sessions

**2:46**  
minutes spent per session  
on tasting room listings

### USER LOCATION



## STRATEGIC PILLAR 2: MARKET EXPANSION

BUILD MULTI-TIER TRADE DEMAND TO GENERATE GROWTH OPPORTUNITIES

# OREGON WINE RESOURCE STUDIO

The [Oregon Wine Resource Studio](#) is an innovative sales and training resource developed for members of the Oregon wine industry and those who support it. This 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.

This year, the user experience of the Resource Studio website was improved through updates to its organization and navigation, helping users more easily find what they need. Additionally, a new AVA, Van Duzer Corridor, was approved in January, and a new presentation and map for the AVA were added to the website. Three videos of master classes recorded in New York City were also incorporated into the site’s offerings. Industry statistics were updated using data from the 2017 Winery and Vineyard Report and other sources, and a host of new accolades from the media were incorporated.

All users who downloaded content have opted into being added to the OWB’s trade newsletter list.

### RESOURCE STUDIO BY THE NUMBERS 2018-2019

**56k**  
pageviews

**13k**  
unique users

**2:49**  
minutes average  
session length

**15%**  
traffic from  
international users

**5k**  
files  
downloaded

### WHAT’S IN THE RESOURCE STUDIO

**27**  
presentations

**25**  
maps

**6**  
regional tech  
sheets

**7**  
master class  
videos

**1**  
podcast

# LEARN OREGON

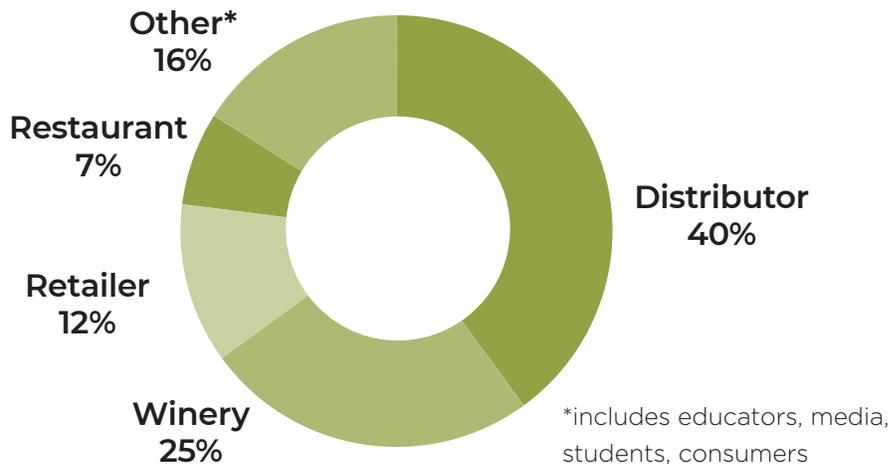
In March, as part of priming the trade to sell during Oregon Wine Month, the OWB launched Learn Oregon, a four-week online master class series. Each week, a new topic was delivered via email and culminated with critical thinking questions. Topics included an Oregon wine overview, environmental stewardship, labeling regulations and tips for selling Oregon wine. A bonus webinar featured “The Personalities of Oregon Pinot noir.”

More than 2,000 wine professionals from 46 states and 26 countries signed up to receive the program emails, including members of the trade and media as well as employees of Oregon wineries. The 336 participants who completed each week’s critical thinking questions by April 1 earned a certificate of completion. The [Learn Oregon curriculum](#) can be found on the Oregon Wine Resource Studio website.



Learn Oregon Certificate of Completion

## PROGRAM COMPLETION BY EMPLOYER TYPE:



*“The information was extremely useful and applicable to sales.”*

- CALIFORNIA-BASED DISTRIBUTOR SALES REP AND LEARN OREGON PARTICIPANT

# TEXSOM PARTNERSHIP

Over the past several years, the OWB has been growing its partnership with the TEXSOM organization with the goal of helping Oregon wineries gain access to influential members of the trade. There are two primary expressions of this partnership: sponsoring TEXSOM's annual conference and supporting Oregon wineries in submitting wines to the TEXSOM International Wine Awards.

## **Conference Sponsorship**

The annual TEXSOM conference is considered by many to be the most prominent and influential wine trade education conference in the country, offering seminars, networking opportunities and rare chances to taste premium wines from around the world. The conference boasts an impressive list of attendees including sommeliers, retail wine buyers, distributor/importer executives and sales reps, Master Sommeliers, Masters of Wine, consumer and trade media, wine educators, and producers from all over the world.

In August, OWB hosted a lunch for 200 sommeliers volunteering at the conference. Most were fine wine restaurant buyers studying for Court of Master Sommelier exams and came from all over the country including key fine wine markets such as Chicago, Atlanta, Florida and Texas.

At the lunch, an overview of Oregon's diverse climate and geology was presented through the lens of eight white wines of different varieties from the Willamette Valley and Southern Oregon. Each lunch guest received a folder with tech sheets and an Oregon Wine water bottle adorned with an AVA map.

## **TEXSOM International Wine Awards Shipping Program**

The TEXSOM International Wine Awards (TIWA) competition, held annually in February, provides TEXSOM organizers exposure to wines and winegrowing regions through competition submissions. This subsequently influences the content presented at the TEXSOM conference. In an effort to increase the

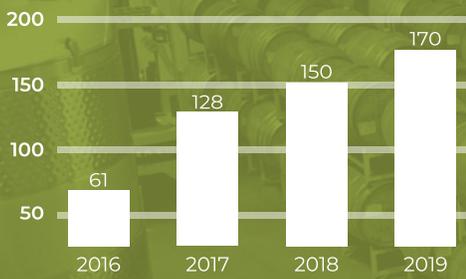


*OWB Education Manager Bree Stock MW presenting at the TEXSOM Volunteer Lunch*

presence of Oregon wines at future TEXSOM conferences by expanding Oregon's presence at TIWA, OWB continued encouraging wineries to enter the prestigious awards program by removing the barrier of shipping costs.

For the second year in a row, OWB negotiated a sponsorship with FedEx to offer all Oregon wineries free shipping for submissions to TIWA. 45 wineries took advantage of this opportunity, up from 31 wineries last year. Oregon saw a record number of entries and a 13% increase in award-winning wines from across the state.

### OREGON'S 2019 TEXSOM INTERNATIONAL WINE AWARDS RESULTS



**178%**  
Increase in award-winning Oregon wines



**10**  
Gold Medals



**14**  
Oregon AVAs



**36%**  
of Oregon's award-winning wines were made with white varieties

# OREGON WINE TRAIL EVENTS

An integral part of the OWB's Market Expansion efforts is a series of trade education and consumer engagement events in markets where category development data and Oregon brand availability confirm good potential for increased Oregon wine sales. The events begin with an invite-only trade master class followed by a trade and media walk-around tasting and conclude with a ticketed consumer walk-around tasting.

The creative concept for these events is "[Oregon Wine Trail](#)," invoking imagery of Oregon as a region of discovery and including design features evocative of a visit to Oregon's wine country. Attendees are invited to explore the wines of Oregon along different trails such as Sustainably Grown and Diverse Whites. A handful of Oregon food purveyors are invited to showcase the food-friendliness of Oregon wines, drawing on the reputation that Oregon has built as a culinary destination.

The first Oregon Wine Trail event was held April 2018 in Los Angeles, and in spring 2019 the concept was taken to Toronto and New York City. Domestic Oregon Wine Trail events are funded by a Specialty Crop Block Grant from the U.S. Department of Agriculture and Market Access funds awarded by the Oregon State Legislature.

## **Oregon Wine Trail: New York City**

Oregon Wine Trail: New York City took place May 6 at the Altman Building in Chelsea. The event began with "Mastering the Willamette Valley," which showcased eight varieties from all seven Willamette Valley AVAs to 62 top-tier decision makers from the New York area wine trade.

Concurrently, a small reception showcased Oregon producers seeking distribution in the New York market to local distributor executives. Thirteen



*Above: Chris Tanghe MS presents at the Oregon Wine Trail: New York master class*

*Below: Attendees at Oregon Wine Trail: New York trade tasting*

decision makers from 11 distributors sampled wines from 26 producers in a self-pour format. To provide context to the wines being tasted, OWB President Tom Danowski presented a brief overview of the Oregon wine industry.

A walk-around tasting followed, attended by 280 trade and media. Two educational pop-ups explored Oregon Pinot gris and Oregon sparkling wine, allowing for more intimate conversations as well as an opportunity to feature a greater diversity of Oregon producers. A consumer walk-around tasting with more than 300 attendees closed the program, generating \$21,925 in revenue.

Winery participation was open on a first-come, first-served basis with a regional quota imposed by the OWB to ensure diversity of representation. Representatives from 59 Oregon wineries of all sizes traveled to New York.

## OREGON WINE TRAIL: NEW YORK



**73%**

Trade attendees reported they are “more likely to add Oregon wine to their business”



**96%**

Consumers agreed their “knowledge of Oregon wine increased”



**86%**

Winery representatives reported they were satisfied or very satisfied with the event overall



**83%**

Winery reps agreed they would participate in future Oregon Wine Trail events

*“It was an excellent presentation and event. My next wine list will definitely have more selections from Oregon.”*

- MASTER CLASS AND TRADE TASTING ATTENDEE

The day after the Oregon Wine Trail: New York City event, OWB and New Zealand Winegrowers collaboratively hosted an educational event geared toward top wine buyers. Named “Wine From The Edge,” this series of three master classes focused on classic and unexpected wines from the two New World regions farmed near the climatic edges of each region’s respective hemisphere:

- 1. Distinctive Styles of the Burgundian Theme
- 2. White, Rosé and Sparkling Wine from the 45th Parallels
- 3. The Futurists: Regions, Varieties and Trends

Each session featured nine or 10 Oregon wines, incorporating a total of 28 Oregon wines representing 16 varieties and 11 AVAs.



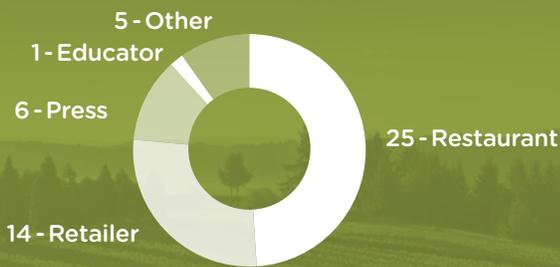
Attendees at Wines From The Edge

Wine From The Edge was attended by 51 people, 76% of whom were buyers, managers or sommeliers from restaurants or retailers. They represented prominent New York accounts including Momofuku, Whole Foods Market, Eleven Madison Park, Bourbon Steak/Four Seasons Hotel, Union Square Café and Babbo. Prominent members of the media were also in attendance, including Ray Isle of Food & Wine.

Of the attendees that took the follow-up survey, 100% were satisfied with the seminars and indicated their knowledge of Oregon wine increased as a result of attendance. What’s more, 78% stated that they are now more likely to add Oregon to their business’s wine selection.

By partnering, OWB was able to share the production costs of a one-of-a-kind event. OWB’s contribution came from Market Access funding awarded by the Oregon State Legislature.

### WINE FROM THE EDGE ATTENDEES



*“So much info in a short space - thank you!!”*  
- WINE FROM THE EDGE ATTENDEE

*“Outstanding knowledge and kept a great pace.”*  
- WINE FROM THE EDGE ATTENDEE

# INTERNATIONAL MARKETING

The expansion of Oregon's export business is important to raising awareness of the state's growing reputation as a world class wine producing region and increasing market demand for its wines. The funding structure for the OWB's export program is unique in that, as part of the Northwest Wine Coalition (NWC), the OWB receives funding from the U.S. Department of Agriculture's Market Access Program. Those funds are specifically earmarked for the promotion of Oregon wines outside the U.S. Additional funding comes from targeted grant opportunities and winery fees for participation in tradeshow, tastings and other programs during the year. OWB also partners with the Washington State Wine Commission (WSWC) through the NWC to fully leverage these funds by sharing market agents, event costs and travel expenses.

## **In-Market Activities**

This past year OWB continued to see growth in winery interest and participation in international programs. More importantly there has also been growth in the number of sales success stories from both small and large wineries. Japan continues to be an important market for Oregon, and the OWB's in-market activity calendar began with the final year of annual trade tastings in Osaka and Tokyo in January. This annual tasting and promotion activity was designed to support the more than 60 wineries in the market; it attracted more than 300 attendees in each city. The approach will shift in the coming years, with an education-focused program in development for release in 2020 to broaden the demand for Oregon wine in Japan.

In March, the OWB conducted its annual European tour. In London, a master class was followed by a trade tasting and an evening magnum tasting event at which wineries poured large-format wines for an invite-only trade group in a casual and social walk-around setting. The trade tasting was well attended and continues to be a successful draw for influential media. Eighteen



*London Trade Tasting*

Oregon wineries participated representing Rogue Valley, Umpqua Valley and Willamette Valley.

After London, OWB hosted a booth at ProWein in Düsseldorf, Germany. Sixteen Oregon wineries participated, showcasing Oregon alongside all of the most prestigious winegrowing regions in the world. This was the largest and most expansive group of Oregon wineries to have participated in the show and as a result the group was able to build relationships and educate an enthusiastic international trade audience. Attending wineries also supported three very popular Oregon wine seminars each day.

The final in-market activity for the year was the OWB's third annual event in Toronto, Ontario in April. To create continuity with domestic events, this event rebranded this year to Oregon Wine Trail. Over two days, OWB hosted a perennially popular consumer dinner with eight wineries at the Granite Club, a well-attended master class, and trade and consumer tastings. Partnerships were forged with Travel Oregon and Air Canada, which organized and provided a sweepstakes for a weeklong trip to Oregon wine country. The 35 participating wineries from around the state poured for crowds of more than 400 at each tasting, continuing to create interest in Oregon's largest export market.

### **Inbound Activities**

OWB's largest inbound tour of the year brought 20 key trade members to Oregon in June from eight international markets: the U.K., Canada, Sweden, Denmark, South Korea, China, Japan and Mexico. It was important to introduce them to wines from around the state, so the tour started with a master class highlighting Southern Oregon wines followed by a dinner with wineries from that region. The group also had the chance to visit a Portland urban winery before attending Oregon Pinot Camp. During their time in Oregon, these influential guests tasted wines from more than 70 Oregon producers. Partnering with recognized programs such as Oregon Pinot Camp provides OWB with ideal opportunities to cement a place for Oregon on the world stage.



*ProWein 2019*

*“The event is extremely well executed and the new space was wonderful ... we saw a large number of the city’s top sommeliers and buyers.”*

**- OREGON WINERY REPRESENTATIVE  
AT PROWEIN 2019**

## STRATEGIC PILLAR 3: WINE TOURISM

CHAMPION HIGH VALUE, ENGAGED AND SUSTAINABLE  
WINE TOURISM STATEWIDE

# OREGON WINES FLY FREE

The [Oregon Wines Fly Free program](#) is a partnership between Travel Oregon, Alaska Airlines and the OWB. Established in 2013, a renewal agreement was signed in early 2019 reauthorizing the program for another two years with no end in sight. Oregon Wines Fly Free allows Alaska Airlines Mileage Plan™ Members to check up to one case of wine for free when departing any Oregon airport, as well as receive a complimentary tasting at any participating winery.

OWB continues to work with its partners to seek effective ways to promote this one-of-a-kind program. This year, digital advertising was secured during Oregon Wine Month in May, and at points throughout the year print advertising promoted the program in Alaska Airlines' *Beyond* Horizon Edition and the Oregon Wine Touring Guide.

Oregon Wines Fly Free features 364 participating wineries representing all of Oregon's winegrowing regions. Wineries can enroll and order printed tasting room material via the [program toolkit](#).

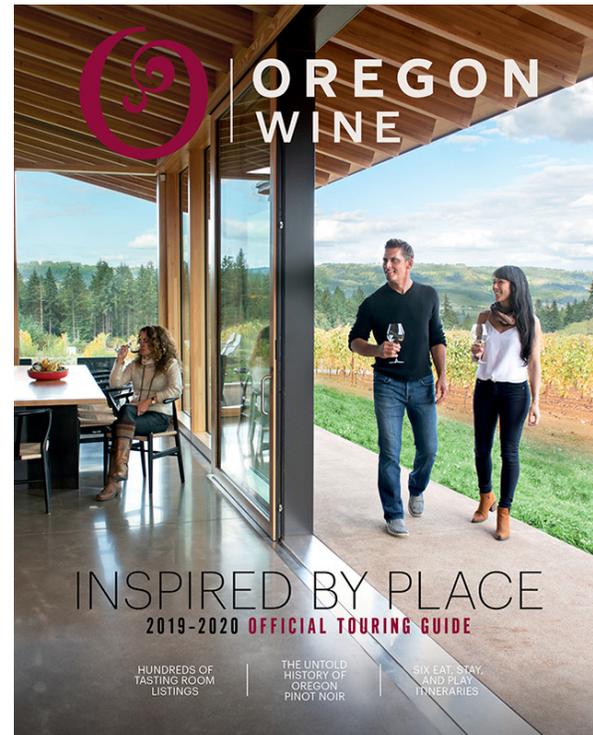


# OREGON WINE TOURING GUIDE

70,000 copies of the fourth edition of the [Oregon Wine Touring Guide](#) were printed in February and tens of thousands are already in circulation in Oregon and around the country. The guide houses 80 pages of new photography, itineraries and editorial content supplemented by regional and local maps and more than 500 tasting room listings. The guide continues to be one of the OWB's most visible tourism assets and is designed to educate wine consumers, inspire travelers and locals alike to explore Oregon wine, and of course facilitate travel around Oregon's varied regions.

The Touring Guide is available free of charge to individuals around the country and businesses throughout the Northwest. From February to June, consumers in 50 states had requested nearly 4,000 individual copies, an increase of 20% over the same period last year. Additionally, 316 Oregon wineries and tourism businesses had [requested a case of 40 copies](#).

In fall 2019 the OWB will execute its annual outreach campaign to collect and verify the tasting room listing information found in the guide. Once complete, a refreshed digital version of the full Oregon Wine Touring Guide will be released in February 2020. The digital guide is always available to view and download online. Since publication, the 2019 digital guide has been viewed more than 2,100 times for an average duration of nearly 11 minutes.



*Oregon Wine Touring Guide, 2019-2020*

## 2019-20 OREGON WINE TOURING GUIDE DISTRIBUTION

**316**  
tourism businesses

**3,500**  
consumer requests  
from all 50 states

**30,000+**  
copies distributed  
since February

# TASTING ROOM DATA DISTRIBUTION

Earlier this year the OWB began supplying winery listing information to Travel Oregon for display on TravelOregon.com and distribution through its Oregon Tourism Information System (OTIS). OTIS is a hub for maintaining information about points of interest like tasting rooms, museums, events and much more. OTIS data is served to tourism partners throughout Oregon as well as to the 2+ million visitors to TravelOregon.com each year.

To expand the footprint of Oregon tasting room data distribution, the OWB supplies OTIS with tasting room data daily via automation, ensuring that edits are promptly reflected system-wide. This partnership not only increases the utility of each tasting room listing, it also provides a consolidated point of data entry for busy wine business owners.

Through this innovative content-sharing partnership, Travel Oregon and its partners benefited from having 67 new tasting room listings added to OTIS and another 364 updates made to winery listings. The OWB database was also enlarged by 31 new tasting room entries.

You can view the more than 500 tasting room listings OWB maintains and shares on its [consumer website](#). Instructions for updating or creating a listing can be found on the [program toolkit](#).



Winery listings on TravelOregon.com

## STRATEGIC PILLAR 4: INSIGHTS & INTEGRATION

ENRICH INDUSTRY INTELLIGENCE, DIALOGUE AND ALIGNMENT

### CONSUMER INSIGHTS: VISITOR PROFILE STUDY

Based on the annual Vineyard and Winery Report, OWB estimates that 25% of Oregon wine sales are made through direct-to-consumer channels. However, for many of Oregon's hundreds of small family wine producers, that number can look more like 50%, 75%, or—in some cases—100%. Sales made at the tasting room or through wine clubs comprise 90% of direct-to-consumer purchases, so it's no wonder that driving tasting room traffic is top-of-mind for many Oregon winery owners.

With this in mind, in summer 2018 the OWB contracted with the University of Oregon's Institute for Policy Research and Engagement (IPRE) to conduct research to understand the demographics, attitudes, and travel and wine purchasing behaviors of people who visit wineries in three of Oregon's major wine tourism regions\*: Columbia Gorge, Rogue Valley and Umpqua Valley. By partnering with regional associations, wineries and tourism organizations in those AVAs, the research team collected more than 5,000 responses to a comprehensive survey throughout the fall and winter.

The following spring and summer, the IPRE research team developed and conducted a workshop for each of the regions included in this study, drawing a total of 74 registrants from the three wine and tourism communities. At the workshop, the team presented its findings and led attendees in dialogue about opportunities presented by the data. The slides from these workshops can be viewed on the [OWB industry website](#).

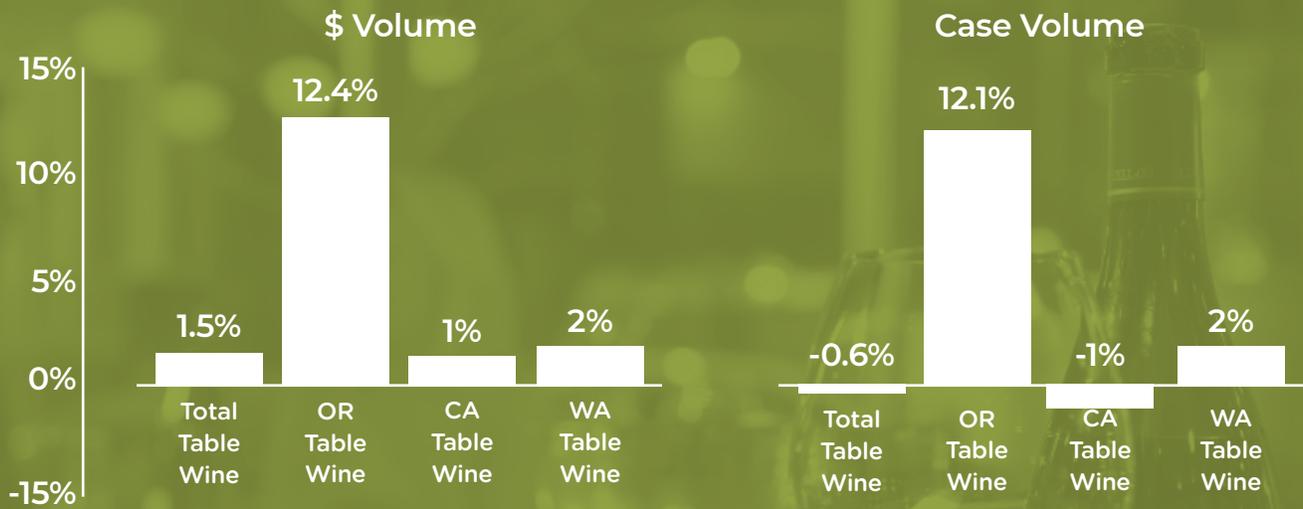
A full report is in development and will be published fall 2019. This work received funding from the Travel Oregon Wine Country Plates grant program.

*\*The Willamette Valley Wineries Association commissioned a similar study, conducted by travel research firm Destination Analysts.*

# MARKET INSIGHTS: NATIONAL RETAIL SALES

In March, OWB published a [market insights report](#) comprising an overview of Oregon wine’s performance in off-premise retail accounts in 2018 using Nielsen data. The report included a snapshot of 16 U.S. markets and four retail price segments relevant to Oregon producers, revealing growth in the national retail marketplace that continues to outpace both the overall table wine category and other major wine producing states.

## NATIONWIDE CATEGORY GROWTH IN RETAIL OUTLETS



Source: Nielsen, Total US xAOC + Liq Plus, 52 w/e 12/29/18

The data reflect sales from about 325 Oregon wine brands and account for around a quarter of Oregon wine sold across all channels globally. This information provides a directional indication of the vibrancy of the premium wine category and Oregon’s position within it. The OWB uses these data to help inform market selection for events such as the Oregon Wine Trail tastings, and makes the information available to Oregon wineries for use in conjunction with other market intelligence for crafting presentations and developing business plans.

# INDUSTRY COMMUNICATIONS

The OWB's [industry website](#) and biweekly [Grapevine Newsletter](#) are the primary sources of information on OWB's offerings, opportunities and resources. The Grapevine reaches more than 2,000 members of the Oregon wine community and enjoys an open rate of 28% with a commanding 6.6% click-through rate, a testament to the value this resource provides the industry.

Industry members who would like to be added to the OWB's distribution list can [sign up here](#).

## INDUSTRY WEBSITE TRAFFIC BY THE NUMBERS 2018-19

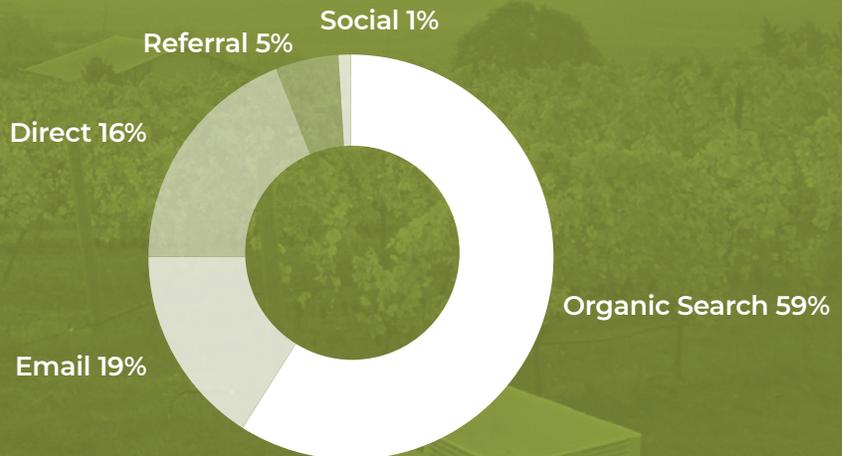
**30,589**  
unique users

**119,381**  
pageviews

**56,676**  
sessions

**1:57**  
minutes per session

TRAFFIC SOURCE



Each year, OWB partners with the Oregon Winegrowers Association to execute the [Oregon Wine Symposium](#), the premier wine industry education event in the Pacific Northwest. For two days in February, industry members gather at the Oregon Convention Center in Portland for rich learning and networking opportunities.

In addition to [educational content](#) that ranges from tasting room best practices to grapevine disease management, a trade show with more than 180 exhibitors provides attendees the opportunity to connect with their suppliers and discover new tools and offerings. The Oregon Wine Soirée caps off the first day, giving speakers and attendees a forum to connect over a glass of Oregon wine and hors d'oeuvres. A new offering this year was a Direct-to-Consumer Roundtable: peer-moderated small group conversations on hot topics for DTC professionals. The offering generated more demand than space allowed, and will be expanded in 2020.

A continuing and primary objective for the 2019 Symposium was to increase the number of Full Access registrations. This was achieved, as the event had the highest attendance to date with 1,495 Full Access attendees. Attendee satisfaction equaled the previous year's rating, with attendees giving the event an average score of 8.8 out of 10. The overall event format and educational content were both rated four out of five ("very good") by attendees responding to the post-event survey.

To continue to evolve the educational offerings at future Symposia, OWB's Education Committee has expanded and is more representative of the industry as a whole. The focus for curriculum development is to take a balanced approach to OWB-funded research representation and practical applications. The 2020 event will feature three tracks—Viticulture, Enology, and Sales & Marketing—and will also include a series of financial modeling workshops utilizing the Oregon Wine Profit Planner.



*Above: Attendees at an enology panel session*

*Below: Dr. Greg Jones delivering the annual Climatology Report*

# OREGON WINE PROFIT PLANNER

The [Oregon Wine Profit Planner](#) is a free tool that guides Oregon wine businesses through the supply and value chain decisions that affect the quality and financial success of growing, making and selling wine. The Profit Planner comprises six workbooks:

1. Vineyard P&L and Cash Flow
2. Winery Cost of Goods
3. Blending Profitability
4. Wine Pricing Calculator
5. Marketing, Sales and Portfolio Management
6. Tasting Room Profitability

In November, OWB delivered a series of four webinars to train the industry on and promote the usage of the Profit Planner. The webinars were attended by nearly 200 industry members. Surveyed webinar attendees all agreed the level of information provided was sufficiently high, they would employ the tool within in their business, and were extremely likely to recommend the webinar and the Profit Planner to colleagues. Recordings and presentations from the webinars are available on the [industry website](#).

In addition to the webinars, a flyer was produced and mailed out to all Oregon wine businesses. The Symposium also featured a seminar called “The Bottom Line: How Understanding COGS Can Increase Your Profitability,” which utilized the Profit Planner to further industry engagement. There are currently 300 registered users.



INDUSTRY.OREGONWINE.ORG/PROFITPLANNER

*Oregon Wine Profit Planner Brochure*

*“This is an ideal tool for our small winery to better manage our business.”*

– OREGON WINERY OWNER

# DIRECT-TO-CONSUMER EDUCATION

In response to industry requests for more training for staff working in direct-to-consumer roles, OWB sponsored two sets of offerings dedicated to that discipline.

## **WISE Academy Workshops**

In February, OWB worked with WISE Academy to sponsor three direct-to-consumer workshops: two on tasting room management and a DTC metrics intensive. The workshops were attended by 203 industry members at rates highly subsidized by the OWB, and both topics saw representation from each major AVA. Survey satisfaction was some of the highest seen with 95% of respondents stating they were highly likely recommend the workshop to a colleague, plan to implement the workshop learnings in their business, and will seek more workshops like these when offered.

*“This was an invaluable seminar. We have been interested in WISE workshops but were not sure of the caliber, having never attended one. We now see the value in their classes and the vast knowledge that their staff possesses. Fantastic!”*

- WISE ACADEMY WORKSHOP  
ATTENDEE

## **VingDirect Webinars**

In the spring, OWB engaged VingDirect to present a series of webinars in advance of the industry’s busiest tourism season. For four weeks in May and June, two 90-minute webinars were offered. Topics included: converting guests to wine club members; advanced sales techniques for the tasting room; building a strong wine club foundation; and retaining wine club members. The versatility of the webinar format allowed 180 industry members across the state to participate, and the workshops were recorded and made available to those who had registered to share with their staff for additional coaching. Post-webinar surveys showed high satisfaction with all attendees likely or extremely likely to recommend the webinars to colleagues, and all extremely likely to implement the lessons in their business.

*“This was such a great investment of time and energy. I can’t think of a better way to grow our industry than giving wineries the tools to grow their sales.”*

- VINGDIRECT WEBINAR  
ATTENDEE

Few if any industries thrive or improve without research, and Oregon's wine industry is no different. In fact, all New World wine regions have developed and funded research programs to fast track the knowledge development that took vignerons hundreds of years in the Old World. The research program in Oregon is widely supported by the wine industry, and industry members participate in cooperative research committees, regional committees dedicated to knowledge transfer, or committees dedicated to reviewing applications for grant support from the Oregon Wine Board.

Over the years, the OWB has committed many millions of dollars collected through grape and wine taxes to its viticulture and enology research program, with the 2018-19 cycle reflecting a record investment of \$437,500. This included tonnage tax money supplemented by funds awarded by the Oregon State Legislature for research initiatives.

To ensure funds invested in research best reflect the evolving needs of the industry into the future, the leadership of the OWB's research program perceived the need to conduct a deep review of the program's direction. Between July and October, OWB staff supported research program leadership to gather input from various facets of the Oregon wine industry.

This included an industry survey with 100 respondents, a seven-stop listening tour during which the leadership group met with 75 industry members, input from wine business leaders, and introspective consideration by a team of about two dozen viticulture and enology thought leaders.



*Vit & Eno Research Strategy Summit, November 2019,  
Newberg*

This last group gathered for a two-day summit in early November to review the feedback and as a result:

1. Affirmed the value of the OWB’s research program to the industry, and the industry’s commitment to funding a research program;
2. Designed a remodeled program for focusing research projects into four areas of strategic priority along with a new vision for the research program;
3. Committed itself to finding and applying metrics to guide future funding efforts;
4. Established a steering committee to guide the development of the annual Request for Applications (RFA) process and subsequent review of applications received; and
5. Committed itself to the continuous improvement of the effectiveness of its research communications and outreach.

## OWB VITICULTURE & ENOLOGY RESEARCH STRATEGIC VISION & PRIORITIES

**VISION:** OWB’s V&E Research program will champion continuous improvement of Oregon’s capacity to produce world-class wines that reflect a sense of place by sponsoring industry-leading research in the development of sustainable practices and climate-adaptive skills.

### STRATEGIC PILLARS:

**WINE  
QUALITY**

Support advancements in wine quality and site expression by enhancing markers of quality in the vineyard and winery

**SUSTAINABLE  
PRODUCTION**

Lead in developing sustainable practices to minimize inputs and reduce impact

**CLIMATE  
CHANGE**

Facilitate adaptation of vineyard and winemaking practices to future climatic conditions

**FOUNDATIONAL  
RESEARCH**

Foster V&E discovery that has the potential to provide foundations for future applications that address the other three strategic pillars

Bhaskar Bondada, Associate Professor, Wine Science Center, Washington State University  
*Microscopy of Red Blotch: A whole new perspective for developing a mechanistic understanding of the disease and its prevention by examining cellular details of the infection* [Read update](#)

Christopher Curtin, Assistant Professor, Department of Food Science and Technology, Oregon State University  
*Elucidating *Brettanomyces* paths of entry into the cellar* [Read update](#)

Laurent Deluc, Associate Professor, Department of Horticulture, Oregon State University.  
*Determining the role of Auxin-Response Factor 4 in the timing of ripening initiation in *Vitis vinifera**  
[Read update](#)

Alexander D. Levin, Viticulturist and Assistant Professor, Department of Horticulture and Southern Oregon Research and Extension Center, Oregon State University  
*Determination of pre- and postveraison water status targets for deficit irrigation of Pinot noir in a warm climate* [Read update](#)

Alexander D. Levin, Viticulturist and Assistant Professor, Department of Horticulture and Southern Oregon Research and Extension Center, Oregon State University  
 Achala KC, Plant pathologist and Assistant Professor, Department of Botany and Plant Pathology and Southern Oregon Research and Extension Center, Oregon State University  
*Keeping them fed and happy: Mitigating negative effects of Grapevine Red Blotch Disease through cultural practices* [Read update](#)

Walt Mahaffee, Research Plant Pathologist USDA-ARS-HCRL  
*Persistence of fungicide resistance in Grape Powdery Mildew* [Read update](#)

James P. Osborne, Extension Enologist, Department of Food Science and Technology, Oregon State University  
*Utilizing malolactic fermentation as a tool to prevent *Brettanomyces bruxellensis* wine spoilage* [Read update](#)

Paul Schreiner, Research Plant Physiologist, USDA-ARS-HCRU  
*Comparing nitrogen fertilization in the vineyard versus supplementation in the winery on quality of Pinot noir and Chardonnay wines and productivity in the vineyard* [Read update](#)

Jeremy B. Weisz, Assistant Professor of Biology, Linfield College  
*Terroir and Microbiomes: Examining the impacts of environmental variations and farming practices on wine grape microbiomes* [Read update](#)



Dr. Achala KC tests grapes in the lab  
 Photography by Stephen Ward, Oregon State University

## FINANCIAL OVERVIEW

The highlight of this fiscal year was the effort and investment made to maximize the industry's investment in marketing and research programs through thoughtfully acquiring additional grant funding. OWB continued to supplement its annual Grape Assessment income with a Specialty Crop Block Grant for out of-state tasting events, a Wine County Plates Grant for the development of winery visitor profiles, a special allocation from the Oregon legislature for market access and research programs, a grant from the Oregon Wine Brotherhood, and a significant investment in international marketing programs through the USDA's Market Access Program and Agriculture Trade Promotion program. Overall income for the year was \$3.1 million, of which nearly 10% came from grant sources. This allowed OWB committees, staff and Directors to continue their important work developing market access programs, funding research grant awards and expanding educational offerings.

The Board Directors enhanced the technical research grant funding pool with the addition of \$87,500 allocated from the Market Access and Research Investment Strategy (MARIS) funding. Another \$150,000 was also committed to fund a partnership program with the USDA's Agriculture and Food Research Initiative (AFRI) for a project related to vine stress and water management in different climatic conditions around the state. Unfortunately, the grant application for the program was not awarded, so those funds were returned to the OWB for reallocation.

Expenses came in as planned for the production of the annual Oregon Wine Symposium, which saw a slight boost in ticket sales due to higher attendance and a modest increase to the ticket price. Overall, the OWB continues to subsidize the event with a budget allocation of more than \$50,000, allowing ticket prices to remain affordable. In addition to Symposium, investments were made in partnerships with tasting room sales educators to develop and deliver in-person workshops and webinars on direct-to-consumer sales strategies and tasting room management tactics.



*Photography by: John Valls*

<b>INCOME</b>	<b>BUDGETED</b>	<b>ACTUAL</b>
Grape Assessment (\$25/ton)	1,812,500	2,019,787
Wine Tax (2¢/gal)	315,000	326,184
Symposium Revenue	280,000	315,640
Program Revenue	120,000	138,946
Grant Funds (Excluding MAP)	110,000	81,438
HB5006 Funds - MARIS	255,432	194,281
Other Income	1,500	9,983
<b>TOTAL INCOME</b>	<b>2,894,432</b>	<b>3,086,259</b>
<b>EXPENSE</b>	<b>BUDGETED</b>	<b>ACTUAL</b>
<b>RESEARCH</b>		
Viticulture & Enological Research Grants	437,500	437,501
AFRI Commitment	150,000	-
Industry Research (Ag Stats)	52,000	56,944
Economic Impact Report (2014-17)	-	-
Business Research	-	-
Visitor Profile Study (WCLP)	50,000	34,831
Compensation, Admin and Travel	20,500	23,793
<b>TOTAL RESEARCH</b>	<b>710,000</b>	<b>553,069</b>
<b>EDUCATION</b>		
Symposium Programming	360,000	368,589
Profit Calculator Training	20,000	12,057
Other Industry Workshops	42,932	25,353
Compensation, Admin and Travel	112,300	112,081
<b>TOTAL EDUCATION</b>	<b>535,232</b>	<b>518,080</b>
<b>MARKETING &amp; COMMUNICATIONS</b>		
Media Relations	150,600	153,574
International Marketing	185,000	187,042
Marketing Programs	310,645	286,869
Marketing Collateral	70,000	63,363
Market Research	30,000	19,325
Compensation, Admin and Travel	173,200	173,774
<b>TOTAL MARKETING &amp; COMMUNICATIONS</b>	<b>919,445</b>	<b>883,947</b>
<b>GENERAL &amp; ADMINISTRATION</b>		
Board Administration	20,000	18,449
Grant Writing Consultants	10,000	500
Industry Relations	26,000	34,737
Program Sponsorships	5,000	756
Office Administration	131,450	126,708
Compensation, Admin and Travel	789,400	764,153
<b>TOTAL GENERAL &amp; ADMIN</b>	<b>981,850</b>	<b>945,303</b>
<b>TOTAL EXPENSE</b>	<b>3,146,527</b>	<b>2,900,399</b>

# OREGON WINE INDUSTRY AWARDS

Each year at the Oregon Wine Symposium, the industry recognizes individuals for their contributions to the Oregon wine industry. Below are those who were honored in 2019.

## LIFETIME ACHIEVEMENT AWARD

Given to an individual whose extraordinary dedication, inspiration and advocacy for the Oregon wine community spans a personal lifetime.

**Jesus Guillén | Winemaker, White Rose Estate  
Founder, Guillén Family Wines**

*Awarded posthumously*

## FOUNDERS AWARD

Given to an individual whose pioneering, groundbreaking work has deeply influenced and advanced the interests of Oregon winegrowers and winemakers, fostering statewide collaboration.

**Grace and Ken Evenstad | Founders  
Domaine Serene**

## OUTSTANDING INDUSTRY LEADERSHIP AWARD

Recognizes an individual whose exemplary commitment and innovative leadership have contributed significantly to the advancement of the Oregon wine industry.

**Alison Sokol Blosser | Co-President, CEO &  
Second Generation Winegrower  
Sokol Blosser Winery**

## VINEYARD EXCELLENCE AWARD

Given to a vineyard employee who demonstrates outstanding collaborative support under the supervision of vineyard directors and viticulturists. This person exemplifies remarkable technical knowledge, professionalism and an outstanding work ethic.

**Meliton Martinez | Vineyard Manager  
King Estate**

## INDUSTRY PARTNER AWARD

Given to a person working in a field tangential to the wine industry whose cooperative approach has positively influenced the success of the Oregon wine industry and its members.

**Dan Jarman | President  
Crosswater Strategies**

## BOARD SERVICE AWARD

Given in recognition of those who have completed their service on the Oregon Wine Board of Directors.

**Steve Thomson | CEO  
Cristom Vineyards**

**JP Valot | Head Winemaker  
Sylvan Ridge Winery & Owner, Valcan Cellars**

# BOARD MEMBERS



**EUGENIA KEEGAN**  
Chairwoman  
Jackson Family Wines



**JOHN PRATT**  
Chair Emeritus  
Celestina Vineyard



**KEVIN CHAMBERS**  
Vice Chairman  
Koosah Farm



**BOB MORUS**  
Treasurer  
Phelps Creek  
Vineyards



**BERTONY FAUSTIN**  
Abbey Creek  
Vineyard



**HILDA JONES**  
Abacela Vineyards  
and Winery



**JUSTIN KING**  
King Estate Winery



**DONNA MORRIS**  
Winderlea Vineyard  
and Winery



**JASON TOSCH**  
Stoller Family Estate

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President



**MARIE CHAMBERS**  
VP Finance &  
Operations



**CHRISTINA  
DeARMENT**  
Trade Relations and  
Education Manager



**STACEY KOHLER**  
Executive Assistant



**KAI McMURTRY**  
Consumer Relations  
Manager



**SALLY MURDOCH**  
Communications  
Manager



**BREE STOCK MW**  
Education Manager



**JESS WILLEY**  
Director of Strategic  
Insights & Industry Relations

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 Terry Brandborg  
 Tresider Burns  
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 Ted Casteel  
 Kevin Chambers  
 Elizabeth Clark\*  
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 Jason Cole  
 Jessica Cortell  
 Dai Crisp  
 Michael Davies  
 Jessie Delarbe  
 Sadie Drury\*  
 Michael Fay  
 Chris Graves  
 Kelli Gregory  
 Brian Gruber  
 Geoff Hall  
 Gina Hennen  
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 Ryan McAdams  
 Brian McCormick  
 Jim McGavin  
 Anneka Miller  
 Erica Miller  
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 Karl Weichold  
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*\*Steering Committee  
 member*

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 Mark Chien  
 Scott Dwyer  
 Bryan Gruber  
 Geoff Hall  
 Gina Hennen  
 Claire Jarreau  
 Anthony King  
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 Dan Rinke  
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 Emily Terrell  
 Vince Vidrine  
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 Vanessa Hadick  
 Greg Jones

Carrie Kalscheuer  
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 Natalie Sigafos  
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 Joth Ricci  
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 Shirley Brooks  
 Randy Ford  
 Jon Foster  
 John Gabelhausen  
 Doyle Hinman  
 David Millman  
 Howard Rossbach  
 Bryanna Schneider Holden  
 Thom Sichta

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FORCE**

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 Terry Brandborg

Laurel Briggs  
 Julia Burke  
 Ariel Eberle  
 Lauren Fuhrman-Burch  
 Joe Ginet  
 Bob Hanson  
 Jason Hanson  
 Joel Kiff  
 Kim Kolb  
 Jean Kurtz  
 Jon Lauer  
 Laurie Lewis  
 Cathy Martin  
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 Tom Mortimer  
 Debby Mudler  
 Scott Neal  
 Sylke Neal-Finnegan  
 Lorrie Normann  
 Mary Olson  
 Luisa Ponzi  
 John Pratt  
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 Steve Robertson  
 Bruce Sonnen  
 Annie Shull  
 Scott Steingraber  
 Betty Tam  
 Jessica Thomas  
 Tom Waliser  
 Dan Warnshuis  
 Nate Winters  
 Jill Zarmowitz

*Thank you to all of the  
 industry's volunteer  
 committee members!*



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