

2017-2018

# ANNUAL REPORT



OREGON  
WINE  
BOARD

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# LETTER FROM YOUR CHAIRMAN

Dear Friends,

I am honored to serve as your Oregon Wine Board chairman for 2018. Only in Oregon would the owner of a small vineyard outside the major growing area of the state be asked to lead such an important statewide industry. Being part of the OWB leadership team has been one of the greatest honors of my life. As the 2018 growing year wraps up and harvest proceeds across the state, I have the pleasure of reporting to you on the progress we have made in the last year.

Our most recent data show an increase in the number of wineries in Oregon to 769, with more being founded all the time. Entrepreneurs have established new vineyards all over our state, bringing the count to 1,144. Operating a wine business is never easy, but the reputation of Brand Oregon is luring many to our state, where our wines win more than their fair share of awards and command premium prices.

Customers demonstrate their appreciation of our quality by buying our wine, and sales across all channels in 2017 exceeded \$3.6 million, growing 6% over the prior year. At the national level, Nielsen reports show the volume of our wine sold at retail increased by 16%, well above the industry average. Our most recent Economic Impact Study, published early 2018, shows the power of our industry within Oregon: \$5.61 billion in economic impact, an increase of 67% in the past three years, with wine tourism revenue more than doubling to \$787 million. Before entering the wine business, I spent my life being an employee. The first time I was able to hire someone—provide a job—I felt enormous satisfaction. I am proud that our industry supports 7,625 jobs across the state.

Every year, the OWB staff conducts an industry survey to help us prioritize our efforts. We listen to your input and come up with a “to do” list of high priority jobs. Based on that, we are very dedicated to increasing the impact of our media relations. We have worked hard to bring in the people who write the stories and blogs that reach so many people, and this past year we introduced an additional media tour anchored around the Oregon Wine Symposium, our premier educational event.

Also based on industry feedback, we have redoubled our efforts at educating the industry about wine business topics, not only with educational programming but also with the development and launch of the Oregon Wine Profit Calculator. This innovative tool is designed to help Oregon wine businesses make smart decisions by understanding how choices made in the vineyard, cellar and sales channels impact

their bottom lines. We can all benefit from this practical tool designed to help keep our businesses viable into the future.

We have fine-tuned our efforts in consumer and trade marketing, anchored by Oregon Wine Month in May, and also introduced creative programming that develops new evangelists for Brand Oregon. Our inaugural Oregon Wine Trail event took place in Los Angeles in April, the first of a series of grant-funded events whose goal is to raise awareness and expand sales opportunities for Oregon wines in key markets around the U.S. Fifty Oregon producers took part in the L.A. event, and 96% said they'd want to be part of another one.

Finally, we heard your appeal for more research on current issues in the vineyard to help us all improve our wine grape farming methods. With existential threats such as red blotch virus doing serious damage all over the state, we need to make sure our knowledge base keeps us ahead of problems so we can focus on quality. Using a portion of the funds given to us by the Oregon legislature, the Board increased our viticulture and enology research allocation to \$437,000 in the upcoming year. This is by far and away the most we have ever been able to spend, and it is a much higher rate per ton than our neighboring state to the north dedicates to research.

This is a great time to be part of the wine industry in Oregon. The reputation of Brand Oregon is stronger than ever, and the ability of winegrowers and winery owners to work together to advance the entire industry is our greatest strength. Thank you for allowing me the opportunity to work in this position. I have enjoyed it tremendously. On behalf of the Oregon Wine Board of Directors, I want to thank you for your many contributions to our accomplishments.

Paz,



John Pratt  
Chairman, Oregon Wine Board  
Owner, Celestina Vineyard

*“Oregon is right now the single most exciting winemaking area in the United States...Collectively speaking, nowhere else does the level of quality seem so high, the perspectives so diverse or the experimentation so fierce as it is in Oregon right now.”*

-ERIC ASIMOV, THE NEW YORK TIMES, SEPTEMBER 14, 2017

# OREGON WINE TRAIL EVENTS

TRADE EDUCATION AND CONSUMER ENGAGEMENT EVENTS

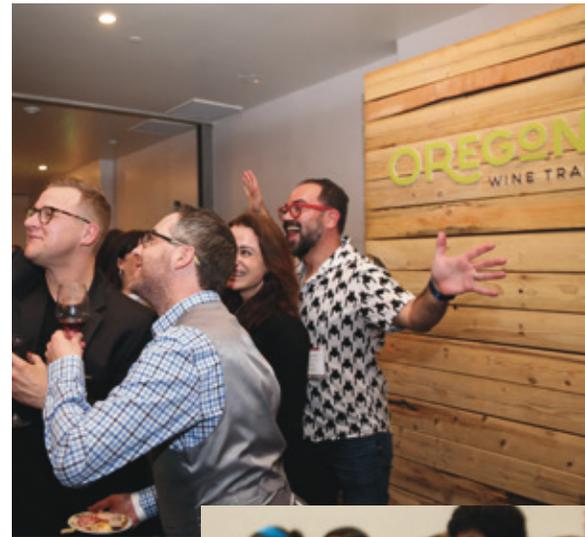
In October, OWB was awarded a Specialty Crop Block Grant for \$174,520 from the Oregon Department of Agriculture to execute four domestic events by June 2020. The funding will be used to host events in target markets where category development data and Oregon brand availability confirm good potential for increased Oregon wine sales. This market outreach strategy responds directly to feedback from industry requests that the OWB expand and enhance the profile of Oregon wine outside of Oregon.

The creative concept for these events is “Oregon Wine Trail,” invoking imagery around Oregon as a region of discovery. Attendees are invited to explore the wines of Oregon along different trails, such as Sustainably Grown and Diverse Whites. We also include a handful of Oregon food purveyors to showcase the food friendliness of Oregon wines, drawing on the equity that Oregon has built as a culinary destination.

All Oregon Wine Trail events will follow a similar format beginning with an invite-only trade master class, followed by a trade and media walk-around tasting and concluding with a consumer walk-around tasting. Each event will also include experiential elements and design features evocative of a visit to Oregon’s wine country.

**Oregon Wine Trail: Los Angeles**

The first Oregon Wine Trail event took place in Los Angeles on April 24. “Mastering Oregon,” a class taught by a Master of Wine and Master Sommelier, showcased eight varieties and nine AVAs to a packed room of 68 top tier trade buyers. More than 130 additional people were waitlisted for the class.



*Above: Consumers at the Oregon Wine Trail tasting in Los Angeles*

*Below: Trade members at the L.A. master class*

A trade and media walk-around tasting followed, attended by 242 industry professionals, during which three small educational pop-ups explored Oregon Pinot gris, Oregon sparkling wine and professional tasting techniques. These informal sessions allowed for more engagement with key trade as well as an opportunity to feature a greater diversity of Oregon producers, including those without distribution in the L.A. market. A consumer walk-around tasting with 279 attendees closed the program, generating \$16,975 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 50 Oregon wineries of all sizes traveled to L.A., filling quotas easily with more than 10 wineries assigned to the wait list.

Moving into 2018-19, we are planning our second event to take place in New York City in May. We are also exploring how to bring the Oregon Wine Trail concept to international focus markets. Visit the [industry toolkit](#) to learn more about the Oregon Wine Trail concept.

## RESULTS



# OREGON WINE MONTH

May 2018 marked the seventh annual Oregon Wine Month celebration. After strategically building the foundation of the Oregon Wine Month campaign over six years, the goal this year was to focus on finding cost efficiencies while expanding the program’s exposure and footprint.

**Paid Media**

Our highly targeted paid campaign generated about 2 million impressions and drove more than 20,000 website sessions directly to program-related pages. In particular, traffic to the [Events Calendar](#), which housed 144 events in May posted by tasting rooms and accounts, doubled year-over-year. We also collaborated with Travel Oregon, Brian Bushlach of Vintage Radio and local social media influencers to create a buzz around the program, resulting in an additional 2 million consumer impressions.

Paid media and owned media resulted in more than 16,000 entries into our Oregon Wine Month sweepstakes. More than 9,000 new contacts have agreed to be added to our newsletter and receive communications from OWB in the future.

**Earned Media**

To help generate earned media, two news releases were distributed in the spring. Our PR efforts resulted in 36 articles calling out Oregon Wine Month for a combined reach of 185,000 views and 1,700 social media shares.. Coverage appeared in The Seattle Times, Oregon Wine Press, Eater Portland, Sprudge Wine and more, served to a combined readership of 45 million, up 300% from 2017. Oregon Wine Month enjoyed seven segments on two local TV channels: KGW and KATU.

**Industry Support and Participation**

An [online marketing toolkit](#) was developed for winery staff, distributors and buyers to use in leveraging Oregon Wine Month across their own sales and



Above: Winning display at Safeway  
 Below: Oregon Wine Month 2018 poster

communications channels. The toolkit generated more than 2,900 page views, a 70% increase over last year. Point of sale kits were shipped by request to 118 tasting rooms across the state.

Finally, wineries throughout Oregon took advantage of the program to help drive direct-to-consumer sales, with 13 regional association groups conducting events coinciding with Oregon Wine Month.

**Trade Support and Participation**

New this year, we developed a Distributor Pitch Deck to help wineries sell the Oregon Wine Month program to their distributors both inside and outside of Oregon. We hosted a webinar to advise on how to use these new sales materials. As a result, Oregon Wine Month point of sale materials were ordered by 70 distributors in 32 states, doubling last year’s shipments.

To encourage on-premise engagement with Oregon Wine Month, we partnered for a third year with OpenTable, the restaurant reservations site. More than 100 restaurants around Oregon participated; most of them offered a flight of three Oregon wines throughout May.

In the off-premise channel, competitions were conducted among wine stewards at two major retail chains, driving creative displays featuring a broad range of Oregon wines.

Next year, the OWB marketing team will continue to push Oregon Wine Month out nationally and hone our in-state efforts to increase the impact of the program.

YEAR-OVER-YEAR RESULTS



# TEXSOM CONFERENCE & INTERNATIONAL WINE AWARDS

The OWB has identified the TEXSOM organization as an important partner to help Oregon wineries gain access to key members of the trade. Given this, in 2017 we sponsored the TEXSOM conference and initiated a free shipping program to encourage wineries to submit wines to the TEXSOM International Wine Awards (TIWA).

## TEXSOM Conference Sponsorship

The annual TEXSOM conference is considered by many to be the most prominent and influential wine trade education conference in the U.S., 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.

At the conference in August, OWB hosted a lunch for 150 volunteer sommeliers who attended the conference to help with wine service and logistics. Most were fine wine restaurant buyers studying for the Court of Master Sommelier exams and came from all over the country including key markets for Oregon wine such as Chicago, Atlanta, Florida and Texas.

At the lunch, we gave an overview of Oregon’s diverse climates and geology 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

In an effort to increase the presence of Oregon wines at the future TEXSOM conferences by expanding Oregon’s presence at TIWA, OWB encouraged wineries to enter the prestigious awards program by removing the barrier of shipping costs. We negotiated a sponsorship with FedEx to offer industry-



*Above: Table set to welcome TEXSOM volunteers  
Below: OWB Education Manager Bree Boskov MW speaking about Oregon wines poured at sponsored lunch*

wide free shipping for submissions to TIWA 2018, held in February. With 31 wineries taking advantage of this opportunity, Oregon saw a record number of entries and a 20% increase in award-winning wines from across the state. What's more, TIWA organizers and judges gained exposure to Southern Oregon wines and decided to include a seminar on the region at the 2018 TEXSOM conference in August.

OWB will again sponsor the TEXSOM volunteer lunch at the 2018 conference and intends to continue to support wineries submitting wines to TIWA.

*“Thanks for the support of the TEXSOM International Wine Awards!  
Oregon absolutely blew us away this year!”*

-JAMES TIDWELL MS, CO-FOUNDER OF TEXSOM

# 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 launched August 2016 and 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. Initial development of the Oregon Wine Resource Studio was funded by a Specialty Crop Block grant from the USDA.

## RESOURCE STUDIO BY THE NUMBERS

**57,000**  
pageviews since  
launch

**13,000**  
unique users

**2:35**  
minutes average  
session length

**14%**  
traffic from  
international users

**13,000**  
files  
downloaded

## WHAT'S IN THE RESOURCE STUDIO

**25**  
presentations

**22**  
maps

**6**  
regional tech  
sheets

**4**  
master class  
videos

**1**  
podcast

New this year, we enhanced the global context of the content. Additionally, soil maps were added to the Willamette Valley AVA presentations using data provided by NewGen Vineyard Services. Industry statistics were updated using data from the 2016 Winery and Vineyard Report and other sources, and a host of new accolades from the media were incorporated.

The Resource Studio is maintained to house the most comprehensive and up-to-date information available, with presentations and other resources updated semi-annually. The website will be updated in fall 2018 to improve user experience based on insights attained through website analytics and feedback from the industry and trade.

All users who download content have opted into being added to the OWB's quarterly trade newsletter.

# GUILDSOMM PARTNERSHIP

GuildSomm is a nonprofit international membership organization for sommeliers and wine professionals that helps members expand their knowledge of the wine world, network and stay up-to-date on industry news and trends.

Marking the culmination of a year-long partnership with OWB, GuildSomm launched its “Wines of Oregon” video in October. The GuildSomm team of three, including Geoff Kruth MS, spent four days in April 2017 traveling through the Columbia Gorge, Willamette Valley and Southern Oregon to interview winemakers. They returned in September to capture additional footage during harvest. OWB is proud to have been the catalyst for this influential group’s first visit to Southern Oregon. To date, the video has accumulated more than 10,000 views, with at least 20,000 ultimately expected.

GuildSomm’s “A Tour of Oregon” podcast, released spring 2017, has since become the organization’s fourth most popular podcast ever, garnering more than 80,000 downloads by trade from around the world. The podcast and video can both be found on the Oregon Wine Resource Studio, GuildSomm website, Vimeo, YouTube and iTunes.



A record 70,000 copies of the third annual Oregon Wine Touring Guide were printed in February. The guide houses 88 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.

Each year we continue the work of targeting the guide's distribution to the highest potential readers. New for the 2018 edition was an expansion of the distribution footprint into Washington state, seeding the Vancouver area and north for 50 miles surrounding the important I-5 corridor between Portland and Seattle. Additionally, 10,000 copies were mailed to Seattle Met subscribers with their May issue. This promotion targeted the most affluent zip codes in the Seattle area to reinforce our geo-targeted Oregon Wine Month digital messaging.

The guide is available free of charge to individuals and businesses around the country. By the end of June, consumers in 50 states had requested more than 3,300 individual copies of the 2018 guide, already surpassing total 2017 individual orders. Additionally, 201 Oregon wineries and businesses had requested a shipment of 40 copies.

The guide is always available to [view and download online](#). Since publication, the 2018 digital guide has been viewed more than 3,000 times for an average duration of nearly 11 minutes.

The 2019 edition will incorporate new editorial, updated maps and a distribution plan that builds on previous years by incorporating welcome centers in northern California.



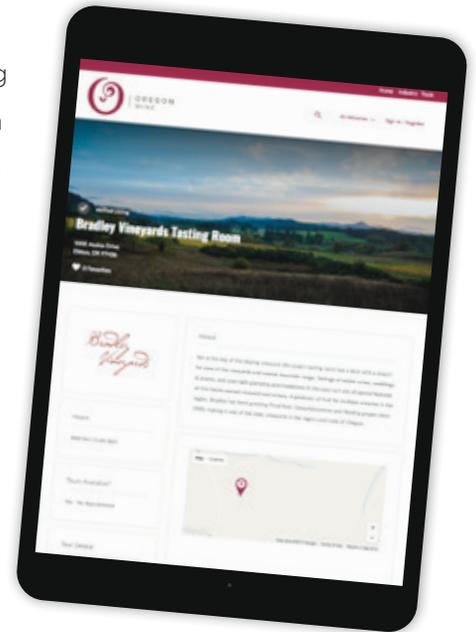
# EXPLORE OREGON WINE TASTING ROOMS ONLINE

Launched in February 2017, the Explore trip planning tool offers consumers a robust overview of 500 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, electric vehicle charging and more.

Each tasting room listing also serves to collect business data for several other important sources including the print and digital edition of OWB's annual Oregon Wine Touring Guide as well as our internal industry database.

New for 2018 is a close partnership with Travel Oregon and its Oregon Tourism Information System (OTIS). OTIS is a statewide repository of tourism resources. It populates the tasting room listing data on TravelOregon.com, which receives more than 350,000 visits per month, among other online sources such as DMO and RDMO websites. OWB's partnership with Travel Oregon means wineries around the state can manage their listing data with a single source - OWB's digital Explore tool - and have confidence that accurate information is being shared with partners around the state and visitors around the world.

Wineries may [access the toolkit](#) for instructions on how to edit or create a tasting room listing.



**500**  
tasting rooms

**32,500**  
pageviews

**3:23**  
average session  
duration

# OREGON WINES FLY FREE

The Oregon Wines Fly Free (OWFF) program, a partnership between Travel Oregon, Alaska Airlines and OWB established in 2013, is currently running through spring 2019 with the expectation of a renewed two-year commitment. A new suite of printed and digital promotional material—including posters, table tents, neck hangers, case stickers and FAQ flyers—was distributed to participating wineries in December.

We continue to work with our partners to seek effective ways to promote this one-of-a-kind program. This year we collaborated with the Willamette Valley Visitors Association on in-terminal advertising at the Portland International Airport at no cost to OWB, as well as secured digital advertising during Oregon Wine Month in May and print advertising throughout the year in Alaska Airlines Magazine Horizon edition, Travel Portland Visitors Guide, Oregon Wine Touring Guide and The Pearl magazine.

In conjunction with Travel Oregon we executed a consumer sweepstakes in October to raise awareness and grow our consumer contact list. From 17,000 entrants, one grand prize winner and guest received a Columbia Gorge getaway package. More than 4,500 opt-in emails were added to our consumer database.

The OWFF program continues to provide high value and return for participating wineries. In our 2017 survey, 72% of respondents reported being “satisfied” or “extremely satisfied” with the program, and 60% indicated the program helped them sell more wine. About 325 wineries representing all of Oregon’s winegrowing regions are enrolled in the program. Wineries may enlist as a participating winery or order tasting room material via the [industry toolkit](#).



## CONSUMER E-NEWS BY THE NUMBERS

**34,500**  
total  
subscribers

**13,000**  
new contacts  
added

**2**  
emails per month  
on average

**26.3%**  
open rate

**5.6%**  
click rate

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 program aims to increase sales of Oregon within restaurant wine programs by engaging with wine buyers and sommeliers and providing public recognition to Oregon's biggest advocates. The 2018 list recognized 129 restaurants.

City Winery Restaurant Group emerged the winner of the 2018 Oregon Wine A-List Wine Program of the Year Award, recognizing a standard of excellence for an Oregon wine program with depth and breadth of Oregon selections, among other criteria. City Winery exemplifies these qualities by offering a well-curated, diverse selection of Oregon producers and both traditional and uncommon varieties of Oregon wines. They also host numerous Oregon wine events and make a house wine from Oregon grapes.

City Winery New York Sommelier Ganna Fedorova traveled to Oregon to accept the award at the 2018 Oregon Wine Symposium.



City Winery Atlanta

*“Putting on a wide variety of Oregon wines with the deep terroir differences between winemaking areas of the state, and showcasing all the delicious flavors Pinot noir has to offer, make our wine lists sing. We love turning our customers on to what we feel is the most exciting wine region in America.”*

- MICHAEL DORF, FOUNDER OF CITY WINERY

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 the market for our wines.

The funding structure for the export program is unique in that the OWB, as part of the Northwest Wine Coalition (NWC), 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 tradeshows, 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.



*Buyers from Japan on their visit to Oregon, August*

### **In-Market Activities**

The 2017-2018 fiscal year saw winery participation grow across numerous in-market events. We kicked off our calendar of activities with our annual trade tastings in Osaka and Tokyo in January. Japan is an important market for Oregon and the interest is still growing. With more than 60 wineries in the market, our annual tastings allow for attendees to sample a broad range of Oregon wines. Held in collaboration with WSWC, the tastings attracted more than 300 attendees each.

In March, we traveled across the Atlantic to start our European tour. We hosted two Oregon-only master classes, a trade tasting and a special event called "Magnum Opus," at which wineries poured large-format wines for an invite-only trade group in a casual and fun walk-around tasting. The trade tasting was one of the best in years with 17 Oregon wineries participating and an outstanding turnout of influential trade and media. Our event in Copenhagen was put on in collaboration with Washington and California and billed as the ever popular "Go West" tasting. This activity featured a joint master class and highly attended trade and consumer tastings. From there we moved on to Düsseldorf, Germany to host our booth at ProWein. Thirteen Oregon wineries



*Trade tasting in London, March*

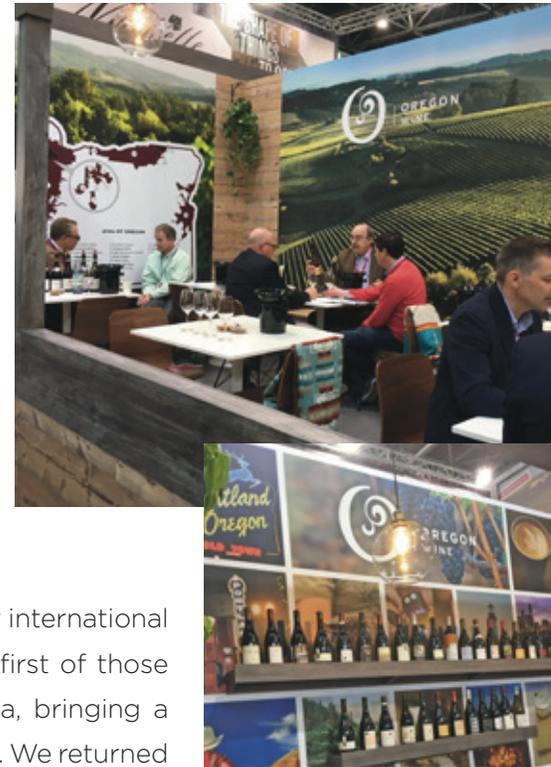
participated, showcasing Oregon alongside all of the most prestigious winegrowing regions in the world. This year, with the help of participating wineries, we redesigned our booth to bring a truly Oregon feel to it. The new layout incorporated a popular tasting bar, which demonstrated the unique collaborative nature of our industry. It was by far the busiest year at our Oregon booth, with standing room-only seminars and ample interest in Oregon wines.

Our final in-market activity for the year was our second annual Taste Oregon event in Toronto, Ontario in April. This is the only market in which we conducted stand-alone events (i.e., without WSWC). Over two days, we held a master class hosted by John Szabo MS, a magnum tasting, and trade and consumer tastings. The 32 participating wineries poured for crowds of more than 400 at each tasting, continuing to create the interest in Oregon wine in our largest export market.

### Inbound Activities

We know the best way to create lifelong Oregon ambassadors is to immerse them in Oregon. Therefore, our international program also includes many inbound tour activities. The first of those was in collaboration with both Washington and California, bringing a group of Danish sommeliers to all three states in September. We returned to Copenhagen in May to reconnect with our tour attendees and others to further their education on Oregon wines.

Our largest inbound tour of the year brought 20 key trade members to Oregon in June from eight international markets including the U.K., Canada, Sweden, Denmark, Australia, Hong Kong, Japan and Spain. It was important to us to introduce them to wines from around the state, so the tour started in Southern Oregon. From there we worked our way up to Portland to experience the urban winery scene before dropping the group off at camp... Oregon Pinot Camp. During their time with us in Oregon, these influential guests tasted wines from more than 70 Oregon producers. Partnering with recognized programs such as Oregon Pinot Camp provides us with ideal opportunities to cement a place for Oregon on the world stage.



*ProWein, March*

Oregon’s wine industry places a high premium on the ability of the OWB to help it connect with high-profile journalists. This is evidenced by Media Relations perennially rising to top priority according to the OWB’s annual survey of the industry. Additionally, “Calls for Wine,” where winemakers can learn about submitting their wines for articles or scoring, is one of the highest trafficked pages on the OWB industry website per Google Analytics.

To support this demand from the industry and to help elevate Oregon wine in the national and international dialogue, OWB continued its quest to bring influential writers to Oregon to meet winemakers from across the state, hosting 15 journalists via organized media tours and one-off visits. The writers spanned the globe, hailing from Japan to New York to Denmark, representing publications including Wine Folly, Forbes Magazine, The Robb Report, The Seattle Times, Great Northwest Wines, SevenFifty Daily, Oregon Wine Press, Wine Business Monthly, Food & Wine, Wines & Vines, Wine Enthusiast and many more.



Above: Summer Familiarity Tour, July  
Below: Cross-Border Tour, May

## 2017-18 COVERAGE REVIEW

### OREGON WINE MENTIONS

**16,757**

Articles mentioning Oregon wine

**46**

Average number of articles per day, up from 33 last year

**+37%**

Coverage increase compared to prior year

**+59%**

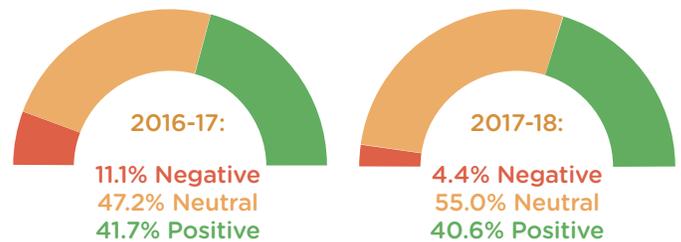
Increase in Oregon Pinot noir mentions

**+74%**

Increase in Oregon Chardonnay mentions

### RAISING THE TONE

This year, we decreased negative sentiment significantly, which is especially remarkable in light of the forest fires in late summer 2017.



27% increase in number of positive articles

Source: Meltwater

**Summer Familiarity Tour**

Our annual July tour began in Portland, branched to the Willamette Valley for the International Pinot Noir Celebration, and then traveled down the state concluding with Southern Oregon. Four top-tier journalists enjoyed local foods paired with wines from 47 different wineries representing 11 AVAs. Eric Asimov from The New York Times also joined the tour for a few stops.

**Results:**

The tour resulted in 10 published articles. The most prolific writer on the tour, Chris Sawyer, has since gotten an assignment from Sunset Magazine to write about Southern Oregon for which he will return in fall 2018.

**Hosted journalists:**

Julie Arnan, David Furer, Chris Sawyer, Yoshiji Sato

**Examples of publications represented:**

Seattle Magazine, Wine Business Monthly, SOMM Journal, Sunset Magazine, Shuhan News

**Symposium Tour**

In February, we initiated a new media tour, taking four writers from the Oregon Wine Symposium to the Oregon Chardonnay Celebration and including additional opportunities to taste through wines from 29 producers in three regions: the Willamette Valley (including Portland urban wineries), the Columbia Gorge and Southern Oregon.

**Results:**

The Oregon Wine Symposium spurred 17 unique articles, while the tour generated an article in Great Northwest Wine and fostered a new relationship with Forbes writer Joe Micallef, resulting in a future trip to Southern Oregon. This tour concluded on a high note with each journalist committing to writing a story on their experiences.

**Hosted journalists:**

Tan Vinh, Eric Degerman, Joe Micallef, Emma Rice

**Examples of publications represented:**

The Seattle Times, Great Northwest Wine, Forbes, Grape Press

**Cross-Border Tour**

In early May, the OWB partnered with the Washington State Wine Commission to host six journalists to learn from some of the Pacific Northwest’s leading winemakers and geologists on why the great Missoula floods ultimately created some of the world’s most unique terroir. The group explored more than 50 vineyards and wineries throughout the Willamette Valley, Columbia Gorge, Columbia Valley and Walla Walla Valley.

**Results:**

12 unique articles in just two months, with more expected. Said one highly respected wine writer: “...that was the most amazing—personal, professional, useful, fun—road trip ever! Thank you for connecting us to your regions’ great talents. And for being our support and companions on the road.”

**Hosted journalists:**

L.M. “Lyn” Archer, Marie-Helene Boisvert, Vicki Denig, Amy Glynn, Sara Schneider, Alana Tielmann

**Examples of publications represented:**

Meininger Wine Business International, Wines & Vines, SevenFifty Daily, VinePair, Paste Magazine, Robb Report, Thrillist

*“In Oregon, a sense of vinous diversity is manifesting itself. Indeed, the state may be best known for its world-class Pinot Noir, but its Pinot Gris, Chardonnay, Viognier, Syrah, and more are also making strides in both familiarity and prestige.”*

-BRIAN FREEDMAN, FORBES, AUGUST 2017

Throughout the year, OWB hosts high-profile wine writers and critics on their visits to Oregon independent of our media tours. These individual trips present great opportunities to partner with regional winery associations and tourism entities like Travel Oregon.

**Thomas Rydberg**, a wine writer from Denmark, was hosted on a one-day visit to the Willamette Valley in October. Thomas authored a multi-page article on Oregon wine published in this important market.

**Vincent Rendonj**, writer at Wine Folly and social media super-user, was hosted on a three-day visit to the Willamette Valley in November. Vincent’s tour resulted in a thorough multi-page online article published in January and thousands of social media impressions throughout his tour. This visit was handled in partnership with the Willamette Valley Wineries Association.

**Erin Brooks**, the new Oregon reviewer at Robert Parker Wine Advocate, tasted about 900 wines from 15 Oregon AVAs in June. She also made more than 20 winery visits over two weeks during her trip to Oregon. As one of the most influential wine publications, Robert Parker Wine Advocate received OWB’s rapt attention while in Oregon to help the new reviewer with her first Oregon report. Her two-part report will publish in the second half of 2018.

**What’s coming up**

Oregon is hot on the minds of writers as a region of discovery. 2018-19 will see enhanced focus on at least two media tours, including the Summer Familiarity Tour. The first half of the year will see a trip to Southern Oregon by Forbes writer Joe Micallef, visits from international writers, and a visit from writer and reviewer Nick Stock of James Suckling’s magazine.

In addition, our media relations efforts will continue to focus on achieving measurable goals, including increasing the overall number of articles, reach and articles showcasing Oregon as a spectacular wine destination.

*“Oregon wines continually reach new levels of flavor and recognition, receiving numerous accolades in magazines and wine competitions. Southern Oregon wines evoke a sense of class, quality and community you can’t find—or taste—anywhere else.”*

-SEATTLE MET, AUGUST 2017

The Oregon Wine Symposium is the OWB's largest annual event. Put on in partnership with the Oregon Winegrowers Association, the Symposium is the premier wine industry event in the Pacific Northwest. The event takes place over two days in February at the Oregon Convention Center in Portland. It comprises a slate of speakers, seminars and panel discussions covering broad topics such as the climate report and forecast and the state of the industry report, as well as specialized content such as tasting room best practices, grapevine disease management, and other hot issues relating to wine business, grapegrowing and winemaking in Oregon and beyond.

In addition to educational content, a trade show featuring more than 180 exhibitors fills a large hall, providing industry members the opportunity to connect with current suppliers and discover new tools and offerings. In the evening of the first day, the Oregon Wine Soirée gives speakers and attendees the chance to connect over a glass of Oregon wine and hors d'oeuvres.

A primary objective for the 2018 Symposium was to increase full admission attendance. This was achieved as the event had the highest attendance to date, with 1,391 attendees. Notably, attendance from Southern Oregon more than tripled. This was also the highest-rated Symposium of the past five years, with 83% of attendees "highly likely" to recommend the Symposium to industry colleagues.

To continue to evolve as we work toward our 2019 Symposium, OWB's Education Committee has expanded and is more representative of the industry as a whole. The focus for curriculum development is on a balanced approach to research representation and practical applications. Next year's Symposium will also include seminars focused on what the OWB has developed for the industry, specifically the Oregon Wine Profit Calculator, Salary Survey and Visitor Profile Study, ensuring amplification of the output of industry resources invested in these efforts.



*Above: Attendees at an enology panel session*

*Below: General session at Oregon Wine Symposium*

# OREGON WINE PROFIT CALCULATOR

The Oregon Wine Profit Calculator is a new 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. Developed in partnership with industry experts and accounting professionals, the three-part Calculator is customized to Oregon-specific conditions, with workbooks addressing vineyard, winery and tasting room economics.

The winery workbook launched in spring 2018 and has been downloaded by 138 people. Two workshops demonstrating functionality of the Calculator were held in March, attracting 25 in McMinnville and 18 in Medford. The workshops were filmed with sponsorship from the Asante foundation and can be viewed on the OWB's industry website.

In the coming year, the final two workbooks will launch, completing the development of the full Calculator tool. We will then focus on increasing adoption by the industry, and produce a series of video tutorials on how to get the most out of this tool. [Request access here.](#)



*Tim Hanni MW presenting the Oregon Wine Profit Calculator to industry members in Medford*

## SALARY SURVEY

The Oregon wine industry's first salary survey was developed at the request of the Education Committee in conjunction with Linfield Professor of Sociology, Dr. Jeff Peterson. The survey, fielded in winter 2018, was completed by 180 industry members. The results were released via a webinar in June, and reported average pay across 20 vineyard, winery and sales positions. Where enough data were available, information was further broken out by region, production size and employee gender. The webinar was attended in real time by 45 industry members, and the [recording](#) has garnered an additional 56 views.

To help address the most pressing concerns of the industry throughout the year, OWB's education program organizes workshops around the state and webinars. These are open to all members of the Oregon wine industry.

### Sales and Marketing

In November, Tim Hanni MW presented a lecture for winery sales and hospitality staff. This seminar provided attendees with an understanding of consumer wine perceptions and preferences, identifying the keys to engagement, conversion and customer retention. The seminar in McMinnville was attended by 45 people.

In March, OWB hosted a webinar presented by Liberated Distribution (LibDib), responding to requests from small- to medium-sized wineries for additional support in finding opportunities for distribution. Tanya Riesbeck of LibDib presented the mechanics of their new business model, which provides an alternative to traditional distribution. Meg Murray of Nasty Woman Wines shared her experience as a small producer working with LibDib and offered advice to others interested in getting started. The webinar was attended by nearly 100 industry members.

In April, OWB hosted Mastering Oregon for Oregon Wine Month, a webinar for distributors, sales and hospitality staff. The webinar was the OWB's best-attended to date, with 150 sign-ups. The webinar is housed on the Oregon Wine Resource Studio for easy access by wine trade professionals.

Also in April, Lesley Berglund of WISE Academy presented a full-day workshop titled Seven Secrets of Professional Sales. The McMinnville and Medford workshops were attended by 65 and 40 industry members, respectively. Normally ticketed at \$700, OWB arranged for the workshop to be offered at just \$55. Given the value provided, the filmed workshop and workbook are password protected. Contact OWB for access.



*Lesley Berglund of WISE Academy presenting in Medford*

**Viticulture**

Following the Oregon Wine Symposium in February, Dr. Andrew Landers led a workshop titled Effective Vineyard Spraying. The workshop and lecture attracted 100 viticulturists and vineyard workers, with live interpretation for the 45 Spanish-speaking attendees. The workshop is the highest rated workshop to date with 100% of attendees stating they would 'highly recommend' this workshop to colleagues.

In April, David Jamarillo, environmental health and safety manager at Jackson Family Wines led a practical workshop for tractor and UTV safety training. This session was put on in conjunction with the Wine Studies Program at Chemeketa Community College, attracting 60 industry members. Interpretation for the 35 Spanish-speaking attendees was funded by the Erath Family Foundation.



*Photography by: Jim Fisher*

The jury is in and the verdict declared: Oregon can consistently produce grapes and wines rivaling any in the world. This can be seen in the scores, the demand in the marketplace and in the praise from the reviewers. However, all in Oregon's wine industry understand that this status can continue only if we adhere to the motto, "Continuous Improvement." Pressures such as diseases in the vineyard, emerging challenges in the winery and—indeed—changes in our climate can demand new strategies, new information, and renewed skills. Toward the Oregon wine industry's goal of continuous improvement, the OWB supports research on viticulture and enology as well as business and economics issues.

#### **Viticulture and Enology**

The 2017-2018 fiscal year has been one of research successes, expanded financial investment in research, and questioning. A complete list of research projects supported by the OWB can be found below. In particular, Dr. Walter Mahaffee has made important progress in understanding the origins and management of the resistance of powdery mildew to commonly used fungicides. In a multi-year project aimed at understanding how to control the emergence of flavor-altering microbes in the winery, Dr. James Osborne has demonstrated the multifactorial impacts of length of cold soak, temperature of cold soak and concentration of  $\text{SO}_2$  in the winery. In a multi-year, multi-investigator collaboration with a dozen vineyards in Oregon, Dr. Patricia Skinkis has continued her work to understand the impact of crop load levels on grape quality. This work has important economic consequences for Oregon grapegrowers and winemakers, and it is noteworthy that the study has also garnered support from funding agencies outside the state for its broad impactfulness.

In view of the importance of research to our industry, the OWB has identified outside funding sources to augment its support of this program. Through



*Dr. James Osborne pouring grapes into the wine press  
Photography by Stephen Ward, Oregon State University*

an allocation of funds from a grant from the State of Oregon, the Board approved an increase in the viticulture and enology research budget of \$87,500 for 2018-19, bringing the total funding to \$437,500. Furthermore, the Board has committed \$150,000 toward an anticipated matching grant from USDA NIFA for a water management research project to be selected and funded in 2018-19.

### **Business & Economics**

In August, the Board approved its first Request for Applications for projects related to business and economics topics raised during a listening tour held in fall 2016. The Business and Economics Research Committee reviewed five proposals and awarded \$50,000 to Dr. Nadia Streletskaya's project titled "Driving sales through tasting rooms: behavioral economics approach to consumer choices." This project uses lab and field work to study how variables in tasting room experiences affect consumer behavior as it pertains to purchases and wine club enrollment. The majority of this study will be conducted in fall 2018, with the finished report anticipated in winter 2019.

### **Moving Forward**

All this energy and enthusiasm for new knowledge and comprehension has demanded that the OWB ask, "What continuous improvements can we make to our research program? How can funding be better allocated to improve the return on investment?" ROI for research can be devilishly difficult to measure, but continuous improvement demands that the question be asked. To this end, leaders of the OWB's Research Committee have initiated a strategic planning process to be completed in 2018-19. The Committee is determined to be able to assure the industry that its precious tax dollars are being spent as wisely as possible, and that actionable outcomes from the research are communicated to the industry for adoption where relevant.



*Dr. Patty Skinkis at Archery Summit  
Photography by Denise Dewey, Oregon State University*

# 2017-2018 FUNDED PROJECTS

Laurent Deluc, Associate Professor, Department of Horticulture, Oregon State University: *Determine the role of Auxin-Response Factor 4 (ARF4) in the timing of ripening initiation in Vitis vinifera.*

Alexander D. Levin, Department of Horticulture and Oregon Wine Research Institute, Oregon State University and Southern Oregon Research and Extension Center: *Determination of pre- and postveraison water status targets for deficit irrigation of Pinot noir in a warm climate.*

Walt Mahaffee, Research Plant Pathologist USDA-ARS-HCRL, and Lindsey Thiessen, Department of Botany and Plant Pathology, Oregon State University: *Grape powdery mildew management—A fungicide timing and selection conundrum.*

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.*

Ron Runnebaum, Assistant Professor, Department of Viticulture & Enology, University of California Davis: *Clonal evaluation of grape powdery mildew resistance in a heritage Pinot noir clone and comparative wine fermentation, chemical and sensory analysis.*

Paul Schreiner, Research Plant Physiologist, USDA-ARS-HCRL and OWRI: *Comparing nitrogen fertilization in the vineyard versus supplementation in the winery on quality of Pinot noir and Chardonnay wines and productivity in the vineyard.*

Patty Skinkis, Associate Professor and Viticulture Extension Specialist, Department of Horticulture, Oregon State University: *Statewide crop load project: A researcher-industry partnership to understand the yield-quality relationship in cool climate Pinot noir and Chardonnay production.*

Nadia Streletskaya, Assistant Professor, Applied Economics, Oregon State University: *Driving sales through tasting rooms: behavioral economics approach to consumer choices.*



## FINANCIAL OVERVIEW

This fiscal year was marked by the Board's investment in a number of new programs and enhancements to existing programs. We supplemented our annual Grape Assessment income with a Specialty Crop Block Grant for out-of-state tasting events and a special allocation from the Oregon legislature for market access and research programs. Our overall income for the year was \$2.6 million, allowing OWB committees, staff and Directors to continue our important work developing market access programs, funding research grant awards and expanding our educational offerings. In total, our Board-approved budget shows expenses exceeding income, as we planned to use the prior year's surplus to invest in the slate of new and expanded programming.

For the first year, the Board Directors chose to directly fund a Business & Economics Research Grant program in the amount of \$50,000. The grant was awarded to an economic researcher at Oregon State University for a project related to Oregon tasting room consumer behavior. We expect to see project results and a full report in winter 2019.

Another first-ever research commitment was made in partnership with the USDA's Agriculture and Food Research Initiative for a project related to vine stress and water management in different climatic conditions around the state. OWB planned to invest \$150,000, which we anticipate will be matched by the USDA for full project funding of \$300,000. Due to the timing of the project, these funds were not expended in 2017-18, but we expect to have an approved proposal and funding by January 2019.

Expenses came in higher than expected for the production of the annual Oregon Wine Symposium, but the additional investment allowed OWB to enlist a fresh and influential slate of speakers from around the wine world and expand attendance while maintaining our goals of video-recording and archiving all sessions on our website; providing relevant and educational



*Photography by: John Valls*

tasting opportunities; and making the largest wine industry trade show in the Northwest accessible to and fruitful for industry and service attendees.

This year, we also invested in the development of an Oregon-specific vineyard and winery profit calculator tool and associated workshops around the state to educate industry members on its use for budgeting, forecasting and general financial planning for a profitable business. We also greatly expanded our workshop offerings this year by funding a vineyard spray workshop, sales education workshops and others.

Our marketing and communications expenses overall came in under budget, while continuing to deliver expanded media tour activities throughout the year, execution of successful Oregon Wine Month and Oregon Wine A-list Awards campaigns, and the introduction of the Oregon Wine Trail event concept. The Marketing Program (\$346,674) and International Marketing Program (\$131,125) costs are offset by Program Revenue (\$105,400) and Grant Funds (\$54,543). Also, the majority of expenses associated with the international marketing activities (totaling \$476,529) were covered by various federal grant programs, including the Market Access Program (MAP).

*“If you’re looking for wines made from old vines, your mind probably journeys to Germany, France, Spain or Italy. In the New World, it might be 19th-century Shiraz from the Barossa, or Zinfandel from California. But do you know that many of America’s most interesting old-vine bottlings are made in Oregon?”*

-PAUL GREGUTT, WINE ENTHUSIAST, AUGUST 2017

<b>INCOME</b>	<b>BUDGETED</b>	<b>ACTUAL</b>
Grape Assessment (\$25/ton)	1,650,000	1,879,536
Wine Tax (2¢/gal)	320,000	310,532
Symposium Revenue	245,000	261,216
Program Revenue	55,000	105,400
Grant Funds (Excluding MAP)	100,000	54,543
HB5006 Funds - MARIS	22,068	22,068
Other Income	1,100	2,981
<b>TOTAL INCOME</b>	<b>2,393,168</b>	<b>2,636,276</b>
<b>EXPENSE</b>	<b>BUDGETED</b>	<b>ACTUAL</b>
<b>RESEARCH</b>		
Viticulture & Enological Research Grants	350,000	350,352
AFRI Commitment	150,000	-
Industry Research (Ag Stats)	70,000	61,360
Economic Impact Report	15,000	17,000
Business Research	50,000	49,727
Compensation, Admin and Travel	20,000	17,005
<b>TOTAL RESEARCH</b>	<b>655,000</b>	<b>495,444</b>
<b>EDUCATION</b>		
Symposium	315,000	359,016
Profit Calculator Development	30,000	37,412
Other Industry Workshops	22,068	22,068
Compensation, Admin and Travel	82,000	112,355
<b>TOTAL EDUCATION</b>	<b>449,068</b>	<b>530,851</b>
<b>MARKETING &amp; COMMUNICATIONS</b>		
Media Relations	175,000	160,576
International Marketing	110,000	131,147
Marketing Programs	303,000	346,674
Marketing Collateral	97,000	87,642
Market Research	50,000	10,830
Compensation, Admin and Travel	270,000	240,427
<b>TOTAL MARKETING &amp; COMMUNICATIONS</b>	<b>1,005,000</b>	<b>977,296</b>
<b>GENERAL &amp; ADMINISTRATION</b>		
Board Administration	20,000	19,493
Grant Writing Consultants	10,000	10,550
Program Sponsorships	20,000	8,727
Compensation, Admin and Travel	690,500	752,410
<b>TOTAL GENERAL &amp; ADMIN</b>	<b>740,500</b>	<b>791,180</b>
<b>TOTAL EXPENSE</b>	<b>2,849,568</b>	<b>2,794,771</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 2018.

## LIFETIME ACHIEVEMENT AWARD

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

**Patricia Green | Owner and Winemaker**  
Patricia Green Cellars

*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.

**Casey McClellan | Founder**  
Seven Hills Winery

## OUTSTANDING INDUSTRY LEADERSHIP AWARD

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

**Bob Martin | Research Leader**  
USDA Agricultural Research Service

## 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.

**Leobardo Gomez | Vineyard Manager**  
Seven Hills Vineyard

## 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.

**Thomas Hellie | President**  
Linfield College

## BOARD SERVICE AWARD

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

**Ellen Brittan | Co-Owner**  
Brittan Vineyards

**Doug Tunnell | Owner**  
Brick House Wines

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Celestina Vineyard



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 Sub-Committee member

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