

2020-2021

# Annual Report

oregon  
wine BOARD

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# A letter from the president.

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Dear Friends,

This past year repeatedly tested our capacity for overcoming the unexpected.

The world continued to cope with the rolling disruptions of COVID-19 while Oregon growers, winemakers, and their business partners experienced historic wildfires in indelibly memorable and—in some cases—devastating ways.

Our wine economy, measured by its statewide economic impact, contracted by \$1.5 billion last year. Events conspired to choke off market access, suspend long-haul tourism, redirect wine consumption back to our homes, and then, at harvest time, to blanket vineyards around the state in dense, ground-level fire smoke that contributed to a 29% drop in 2020 tonnage. The final punctuation mark on the fiscal year, a stifling heat dome in late June, left us even more anxious than before to turn the page on 2020-21.

The pages that follow reflect recovery programs anchored in the extraordinary resolve of our industry members to cope with new market pressures and forces of nature. Our community demonstrated a capacity for sensing and responding quickly to tectonic transition and embracing new business conditions and demand dynamics.


Market data continue to confirm that Oregon is emerging from the pandemic with volume momentum that's envied by peers, supported by trade buyers, extolled by media, and fueled by consumers' willingness to seek out and pay for extraordinary quality.

In Education, the Oregon Wine Board adapted to deliver fresh, vibrant content online and at the same time sustain strong community connections.

In Research, we partnered locally in new ways with in-state scientists and joined our West Coast colleagues in seeking opportunities to broaden our understanding of emerging climate and weather influences.

In Communications and Marketing, OWB tapped into the promise and personalities in our midst. A new brand positioning architecture for Oregon Wine was built on the accomplishments and aspirations that continue to attract talent, energy, and investment from around the world.

On behalf of the Oregon Wine Board's management team and Directors, thank you for your energy, support, and encouragement that made an historic year satisfying in so many unexpected and unforgettable ways.

A handwritten signature in black ink that reads "Tom Danowski". The signature is fluid and cursive, with the first name "Tom" and last name "Danowski" clearly legible.

Tom Danowski, President



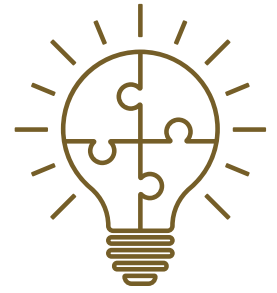
2020-2025

# Oregon Wine Board strategic plan.

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## VISION

The Oregon Wine Board firmly believes that a rising tide lifts all boats. In its unique statewide position, the Oregon Wine Board is a critical partner to the Oregon wine industry, working to raise the tide by cultivating an environment in which our grapes and wines are coveted, winegrowers and producers are well-equipped to compete, all people are treated with equal respect, and all are buoyed by our industry's collective success.



## STRATEGIC PRIORITIES



### ENHANCE THE REPUTATION OF OREGON WINE

**Define, protect, and promote the reputation of Oregon Wine globally.**

- Establish a well-defined Oregon Wine brand with focused messages, attributes, and brand guidelines
- Promote statewide alignment to amplify and ensure consistency of brand message to external audiences
- Increase global awareness of the quality and breadth of the Oregon wine category
- Fuel research that sustains and advances wine and grape quality



### DELIVER KNOWLEDGE & INSIGHTS

**Advance collective intelligence in support of growing, making, and selling quality wines.**

- Commission and curate technical, business, and market research to advance industry practices
- Be the experts on the Oregon wine industry in support of telling its stories and communicating its impact
- Make data and insights easily accessible to industry members at all times
- Leverage funding and maximize knowledge-sharing through partnerships in research and education



### PROVIDE LEADERSHIP & PARTNERSHIP

**Harness statewide strength to unite and empower the Oregon wine industry.**

- Prioritize activities that will have greatest impact on the advancement of the statewide industry
- Establish development opportunities for regional associations appropriate to their lifecycle needs and in service to the advancement of Brand Oregon
- Institutionalize venues for cooperation and input-gathering among regions and other industry groups

## SUCCESS REQUIREMENTS

### Transparency:

Achieve clear priority-setting, transparent resource allocation, and unambiguous communication

### Strategic partnerships:

Create strong partnerships with wine and industry-tangential organizations to amplify our work

### Professional development:

Sustain and grow capabilities through professional enrichment and continuing education opportunities

### Metrics of success:

Institutionalize a process for tracking and communicating progress through measurable metrics



## STRATEGIC PRIORITY 1

# Enhance the reputation of Oregon Wine.

The Oregon Wine Board will define, protect, and promote the reputation of Oregon Wine globally.

## Introducing Oregon Wine's new brand identity.

In recognition of Oregon Wine's powerful and esteemed reputation, and in response to industry feedback, the Oregon Wine Board completed the most thorough and extensive Oregon Wine brand identity development in the industry's 60-year history. We received a \$50,000 Wine Country License Plates matching grant through Travel Oregon to help fund this foundational work and enhance the industry's tax dollars.

Our process included a robust discovery and strategy phase that captured input from more than 160 industry members from every region of the state through workshops, site visits, surveys, and more. Without the industry's direct input, an honest portrait of Oregon Wine could not have been uncovered—industry engagement was critical to the project's success.

OWB staff, Directors, and our partner agency, Watson Creative, translated industry insights into a new brand identity, brought to life via a holistic suite of materials that demonstrate the True Character of Oregon Wine. A thorough style guide directs usage of new logos and graphic assets, brand language, and photography. These materials are available for use by OWB, regional associations, and individual businesses statewide through a [comprehensive toolkit](#).

The rollout of the new brand style is underway. It can be seen in the 2021 Oregon Wine Touring Guide, on the [oregonwine.org](http://oregonwine.org) and [industry.oregonwine.org](http://industry.oregonwine.org) websites,



## STRATEGIC PRIORITY 1

### ENHANCE THE REPUTATION OF OREGON WINE

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and across our consumer and industry digital communications channels. In the coming year, all consumer touchpoints will be reimagined in the voice, appearance, and style of True Character, enabling us to better define, protect, and promote Oregon's invaluable reputation.

You can experience the brand work by visiting [industry.oregonwine.org/brand-reveal](https://industry.oregonwine.org/brand-reveal).

#### PROJECT OUTPUTS:

- A style guide including brand manifesto, logo, typography, palette, tone, and more.
- Regional Attribute Signatures for Walla Walla Valley, Columbia Gorge, Willamette Valley, Umpqua Valley, Rogue Valley, and Portland regions, plus badges for all AVAs within Oregon.
- Industry toolkit including identity assets, tools, and information for download.



## Brand manifesto.

Some places channel your energies. They direct your hands. They focus your intentions. Some places cultivate purpose, inspire the spirit, and move the heart.

But of all the places, no place is like this place: the coastal ranges, high deserts, and wide valleys of Oregon. A place of rugged grace. Open invitations. And the determination that anything's possible given enough time and effort and patience.

At first, our friends didn't see what we saw. Some said we were brave. Most just called us naive. But they didn't see it: the promise of the Gorge and the valleys of the Willamette, Umpqua, Rogue, and Walla Walla. These landscapes forged by floods and glaciers, cultivated for centuries by caretakers here before us. Beyond the land, we had each other and a vision of what we could do together.

Today, our sense of community and possibility glows even brighter. Tapping the soil. Listening to the vines. Producing vintages of remarkable balance and depth. Today, as we remain humbled by the lessons of every harvest and inspired by the promise of every spring, we still find no better compliment than, "You've got to try this."

Oregon Wine is sourced from the power and the purpose of the place. Risk, resilience, and reward. Expressions you'll discover with every visit and every glass, tracing the adventure and character back to the people who make it.

Oregon Wine. Choose **True Character.**

## Marketing and Communications

The Oregon Wine Board's diverse marketing and communications activities serve four distinct strategic focus areas. The recap of our efforts over the past year are organized under those priorities.

### STRATEGIC PRIORITY 1: BRAND EQUITY

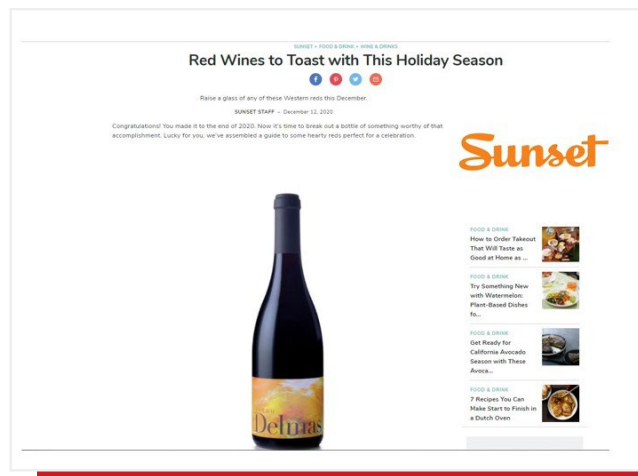
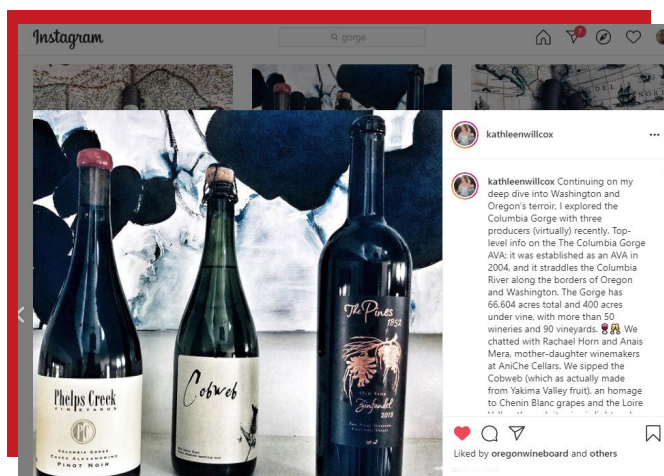
Elevate the esteem of the Oregon Wine brand globally.

#### MEDIA RELATIONS

OWB's media relations efforts strive to place a diversity of positive stories in a variety of consumer, trade, and industry publications, and garner strong critical reviews. The [2021 PR Outreach Plan](#) outlines our month-by-month plan for pitches, press releases, and visit generation.

#### Inbound tours and virtual hosting

At the start of the year, following the virtual cross-border AVA tour in late June 2020, social media and magazine hits filed in. Attending writers captured their experiences with the tour on social media, including a post by Kathleen Willcox that garnered over 600 likes for wineries in the Columbia Gorge AVA. In addition, a wine from the virtual tour—the “standout” 2018 Syrah from Delmas—earned top billing in Sunset's holiday issue in the December 2020 article, *Red Wines to Toast with This Holiday Season*.





While many writers postponed visits to Oregon amid COVID-19 restrictions, we hosted one journalist from The Virginian Pilot that netted articles for Oregon winemakers eager for exposure in East Coast markets. The publication is syndicated throughout Chicago and Baltimore as well as the Washington, D.C., area.

Although the Wine Media Conference—originally planned for August 2020 in Eugene—was postponed due to COVID, OWB took the opportunity to keep Oregon top-of-mind by hosting a virtual tasting featuring Biodynamic wines for 18 writers who were to have attended the live event. Pinot noir from Winderlea Vineyard & Winery and Troon Vineyard's Kubli Bench orange wine were shipped to the writers' homes, 12 of whom wrote subsequent articles, a 66% success rate. Said one person from Artisan Wine Group of Windham, N.H., "This was fantastic, thank you. I get so many questions about biodynamic farming as well; it was great hearing from you in the trenches, if you will."

### Wine reviewers

In October, OWB helped winemakers submit 450 wines to Erin Brooks at the Wine Advocate for review. Similarly, we helped coordinate a call for wines for JamesSuckling.com. Following this call for wines, James Suckling himself reached out to us asking for another, broader call for wines, inviting all winemakers in Oregon to submit at the magazine's expense. We subsequently coordinated a shipment of 671 wines, filling three pallets to Hong Kong in June. OWB also coordinated a Wine & Spirits call for wines in spring 2021.

### Partnerships

In October, OWB augmented PR efforts in support of Celebrating Hispanic Roots, a fundraising project that pulled together the wines of six Hispanic winemakers in Oregon to benefit the Oregon Community Foundation's [Latino Partnership Program](#). We amplified existing efforts by putting these wines in the hands of more than 20 influential local and national wine and lifestyle writers, which resulted in numerous articles. Said Ximena Orrego of Atticus Wines: "I have already said this before but thanks again to OWB. This support really means so much to us."



*The winery owners and winemakers of "Celebrating Hispanic Roots"*

### Smoke events and crisis communications

Crisis messaging across the state dominated communication efforts in fall 2020. Statewide and regional groups met frequently to discuss tactics, and the weeks of Sept. 20 through Nov. 20 were among the busiest for OWB's Communications department as we attempted to generate positive messaging to mitigate the negative. Interviews were coordinated daily with winemakers and OWB staff. Some examples included:

**Yahoo Finance** interviewed Tom Danowski on smoke impact.

A **Wall Street Journal** agriculture reporter requested county data that we had at our fingertips. We fulfilled it quickly, and with the new facts, Oregon escaped mention in a negative smoke story.

**Agricultural Network** interviewed Sarah Murdoch for a 2-part podcast story on smoke impact.

Joe Micallef of **Forbes** wrote two articles, one in July on Oregon wine success in 2019 and the other in September on smoke damage in 2020.

**KGW TV** ran a cautiously optimistic story with 2 million viewers featuring Keely Chalmers interviewing Jason Lett of The Eyrie Vineyards.

In the spring, we devoted efforts to getting ahead of crisis communications before the dry season started. We crafted a Crisis Communications Plan with buy-in from stakeholders from regional groups, OWB staff and Board, Travel Oregon, and more. We identified 14 representatives from around the state to serve as spokespeople during times of crisis and sponsored media training for the group. The training was held mid-July 2021 in Eugene and one attendee noted: "The event was one of the most valuable and enjoyable industry events I've been a part of ... I was nervous about the on-camera exercise but I'm sure that it made me a better speaker and advocate."

## OREGON WINE MONTH

After an almost unrecognizable Oregon Wine Month in 2020, traditional Oregon Wine Month programming remained incongruent with the ongoing social distancing COVID-19 required. As such, we made flexible preparations for May 2021 that could be tailored to the realities of the market at the time. It was clear a focus on digital engagement and nimble digital promotion would be the wisest and safest approach. Our campaign spend was directed to Facebook and Instagram, as well as Google Search and Display ads, and resulted in 1.9 million impressions.

Data from Nielsen confirm 29% growth in off-premise sell-through for Oregon during Oregon Wine Month 2021 compared to the pre-COVID period in 2019, more than triple the category's 9% growth during that period. Direct-to-consumer shipments from Oregon wineries during Oregon Wine Month 2021 grew 31% over 2019, also outperforming the category's 24% increase. Looking toward the future, OWB has assembled work groups for both of these important sales channels to fuel further growth driven by resonant programming and heightened industry engagement.

### Campaign materials

Oregon Wine Month 2021 was the first campaign to use Oregon Wine's new brand identity work. New material for our paid and organic efforts, as well as digital assets for the entire industry, were designed and shared via the [Oregon Wine Month toolkit](#). Custom graphics that allowed regional associations and businesses to easily insert their own photography were particularly popular and helped extend the campaign's reach while starting to disseminate the regional personas embedded within the Oregon Wine brand work.

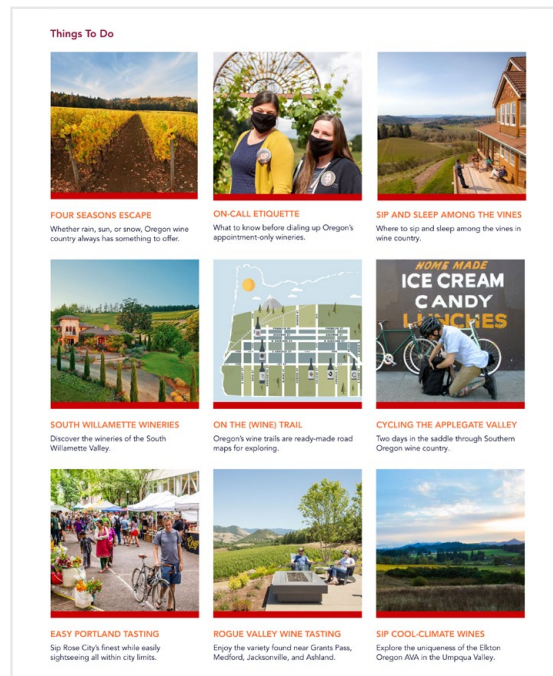
Additionally, digital point of sale files were available for our trade partners nationwide. These files, offered in a variety of formats, allowed partners to download and print on demand with pre-formatted files or completely customize with native artwork files. Given the uncertainty of the on- and off-premise environments, this digital-only approach with enhanced flexibility was a pragmatic way to maximize scarce program dollars while providing an essential promotional tool.





## Wine stories library

To extend our digital offering, build the brand, and capitalize on existing resources for cost efficiency, a brand new Oregon Wine Month [wine stories library](#) was introduced in 2021. This digital library hosts 25 media-rich stories in three categories: Things to Do, Explore True Character, and Plan Your Trip. These stories detail tourism resources and industry character for all regions. In fact, The Rocks District Winegrowers Association, Columbia Gorge Winegrowers Association, PDX Urban Wineries, Willamette Valley Wineries Association, Umpqua Valley Winegrowers Association, and Rogue Valley Vintners were all invited to collaborate on a story most relevant to their respective regions. Paid promotion followed to drive consumer traffic to these stories, which collectively received 21,000+ page views, representing 36% of all Oregon Wine Month page visits and 16% of all oregonwine.org page visits at a conversion cost of only \$0.63 per click on social media platforms and \$0.31 for Google search ads.



## Sweepstakes

To keep Oregon top of mind nationally and seed future travel as most states were emerging from travel restrictions, the Oregon Wine Month sweepstakes offer was expanded to two prizes in collaboration with Rogue Valley Vintners and Willamette Valley Wineries Association. These partnerships transferred sweepstakes package responsibilities to the respective regional associations to optimize relevance, organizational goals, and promotional reach. Through paid social media, dedicated e-newsletters, organic posts, and partner promotion, more than 12,000 unique entries were captured and 7,000+ new or updated readers were added to OWB's e-newsletter subscriber base. At an acquisition cost of \$0.61 per entrant, this promotion was again a cost-effective way to grow consumer contact lists for OWB and the regional organizations.

## Pour It Forward

Another new element this year was the Pour It Forward Instagram campaign, which featured 31 winemakers around the state who shared thoughts on a favorite Oregon bottle. Published daily during May, each winemaker filmed a 60-second vignette about a wine they love, “pouring it forward” to another winemaker to talk about one of their favorites, and so on.

Supported by two press releases about Oregon Wine Month and Pour It Forward, over 14 articles and broadcasts mentioned this activation specifically. The 31 Pour It Forward videos amassed nearly 30,000 views in total. Sip Magazine offered: “Whether it be sharing wine and food or braving the testing times brought by the wildfires or pandemic, members of this community have shown up for each other in full solidarity. After all, they share stewardship of the land and have a common commitment to making fine wine...”



## Trade education

Finally, to engage trade and media worldwide during Oregon Wine Month, OWB developed and presented four virtual master classes—one each on Oregon’s True Character, the Willamette Valley, Southern Oregon, and the northern border AVAs of Columbia Gorge and Walla Walla Valley. The 90-minute webinars enjoyed an average registration of 380 people each. Attendees were primarily from the U.S. and Canada but some hailed from as far as Ireland and Japan. The recordings were distributed to all registrants and remain available for all to view on the [Oregon Wine Resource Studio](#).

## CONSUMER COMMUNICATIONS

The Oregon Wine Board shares programs, offerings, industry events, and other relevant news to a broad consumer audience using our website, e-news mailing list, and social media channels. In spring 2021, all properties were updated to reflect the new Oregon Wine brand identity.

A range of compelling program content is hosted—and a digital trip-planning directory is offered—at [oregonwine.org](http://oregonwine.org). The directory includes 552 tasting room

listings, making it easy for users around the world to plot itineraries by geography, grape variety, region, and dozens of other filters. Industry members can claim or edit their directory listing using instructions provided on the [Tasting Room Listings toolkit](#).

## oregonwine.org website traffic by the numbers 2020-21

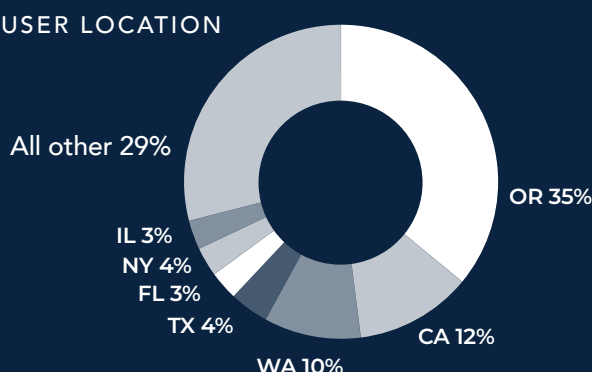
119,531  
users, up 56%

247,937  
pageviews, up 51%

149,035  
sessions, up 62%

2:10  
minutes spent per  
session on tasting room  
listing pages

### USER LOCATION



## STRATEGIC PRIORITY 2: WINE TOURISM

Champion high value, engaged, and sustainable wine tourism statewide.

### OREGON WINE TOURING GUIDE

In April, 70,000 copies of the fifth edition of the Oregon Wine Touring Guide were printed for circulation in Oregon and around the country, and an identical digital flipbook was made available at oregonwine.org. The publication continues to be one of the OWB's most visible tourism assets and is designed to educate wine consumers, inspire travelers and locals alike, 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.

This latest edition was produced in collaboration with our new publishing partner, MEDIAmerica. Among many other clients, MEDIAmerica also produces the statewide Visitor Guide for Travel Oregon and brings deep experience in tourism assets to the



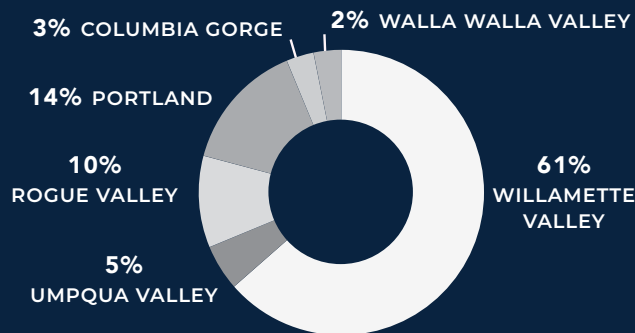


relationship. In fact, content produced for the Oregon Wine Touring Guide has already been syndicated to Travel Oregon’s online audience of more than 2 million readers.

As part of the content development process, the industry was invited to contribute story ideas through the industry [toolkit](#). To continue implementing our 2020 [commitment to equity](#), we ensured that this nationwide tourism resource was reflective of a diverse wine drinking public in appearance and substance. The guide’s roster of professional wine writers is 60% Black, Indigenous, or people of color and 80% female. To reach the widest possible audience we must feature a wide array of voices.

### Touring Guide Fourth Edition

27k copies distributed to more than 500 Oregon wineries and tourism businesses =



### Touring Guide Fifth Edition

April-June 2021

#### PRINT VERSION

3K	copies shipped to consumers
22K	copies allocated to 555 rack locations in Oregon
20K	copies distributed to Oregon wineries and businesses

#### DIGITAL VERSION

23 PAGES	pages viewed per online flipbook session
2.1K	sessions of online flipbook viewing
5:08 MINUTES	average time per online flipbook session

## OREGON WINES FLY FREE

Established in 2013, the Oregon Wines Fly Free program is a partnership between the OWB, Travel Oregon, and Alaska Airlines. Oregon Wines Fly Free allows Alaska Airlines Mileage Plan™ members to check up to one case of wine for free when departing from any Oregon wine country area airport, as well as receive a complimentary tasting at any participating winery. The program aims to incentivize tasting room visitation with complimentary tastings and case sales with waived baggage fees.

OWB continues to work with its partners to seek effective ways to promote this value-add program and all partners remain committed to the program. This year, print advertising was purchased in the Oregon Wine Touring Guide (70,000 copies). Additionally, OWB annually distributes thousands of Oregon Wines Fly Free flyers with program details and frequently asked questions in the Welcome Centers of the PDX and Medford airports. Travel Oregon regularly mentions the program in online articles at [traveloregon.com](http://traveloregon.com) and partners such as Alaska Airlines and Willamette Valley Visitors Association offer digital referrals.

Oregon Wines Fly Free features more than 350 participating wineries representing all of Oregon's winegrowing regions. Wineries can enroll and order printed tasting room materials via the [program toolkit](#).



## STRATEGIC PRIORITY 3: MARKET EXPANSION

Build multi-tier trade demand to generate growth opportunities.

### OREGON WINE RESOURCE STUDIO

The [Oregon Wine Resource Studio](#) is a 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. All users who download content from the Resource Studio opt into the OWB's trade newsletter list, which currently includes about 6,900 contacts.



In early summer, the Resource Studio website was updated to align its back-end functioning with OWB's other websites, increasing site security and improving site maintenance cost efficiencies. At the same time, the site was reskinned to reflect the new Oregon Wine brand.

### OREGON WINE TRAIL

In 2017, OWB received a \$174,500 Specialty Crop Block grant from the USDA to support Oregon Wine market expansion work in select markets around the country. In-person Oregon Wine Trail tasting events and educational seminars were held over the following three years in Los Angeles, New York City, and San Francisco. The fourth and final event was originally slated to take place in Seattle in May 2020, yet COVID-19 necessitated an indefinite postponement.

Given lingering uncertainties about in-person events, we shifted our final experience to a virtual one. In February we concluded the program with a live online master class for trade professionals. With the new format, we were able to bring Oregon Wine education to 223 trade professionals in 25 states from restaurants, fine wine and online retailers, members of the media, and more. Of those, 122 received at-home tasting kits featuring six Oregon wines sourced from around the state. All attendees



participated in the 90-minute seminar followed by a 30-minute happy hour.

The complete Oregon Wine Trail tasting series reached:

- 470 top-tier trade members through four focused master class tastings, featuring 45 Oregon wines, 12 varieties, and 15 AVAs
- 789 retail and restaurant wine buyers through three in-person tastings featuring 97 Oregon wineries
- 851 wine loving consumers through three ticketed tasting events featuring 97 Oregon wineries
- 115 members of the media across the event series



## INTERNATIONAL PROGRAMMING

The focus of the Oregon Wine Board's international marketing programming is to leverage the funds received from USDA's Market Access Program and other grants, which are allocated to promote the awareness of Oregon wines globally. Working closely with Washington State Wine as part of the Northwest Wine Coalition (NWC), we have hosted various trade tastings, shows, and inbound tours targeting key members of the international trade throughout the year. The NWC partnership allows us to fully leverage our funding by sharing marketing agents and costs in certain markets throughout the world.

Of course, the global pandemic has made our typical activity structure more difficult to execute but, together with in-market partners, we have been able to shift and use some of our budget to deliver valuable programming in our target markets across the globe.

### Canada

In Canada, we continued to work with our partners, Predhomme Market Strategies, to deliver a five-part series of comprehensive and interactive modernized trade and media virtual engagements. Over 30 top buyers and influencers attended—including the LCBO—with 21 wineries participating. While the planned in-market Northwest Wine Expedition tastings across four markets had to be postponed again, our team in Canada worked hard behind the scenes to continue engagement with the key monopolies across the country.

## United Kingdom

In the U.K., OWB secured a new partner to reflect a change in strategy, shifting focus from the trade audience to consumers and media at the request of the International Marketing Committee. OWB secured PR and marketing agency LOTUS Communications, who hit the ground running by developing a social media and PR campaign, content hub, and placements for wineries in various lifestyle magazines with large reach in the U.K. market.

Additionally, OWB partnered with London retailer D Vine Cellars to host a virtual consumer tasting with an eye to increasing awareness and sales for Oregon wineries. The event sold out within an hour and wines were packaged and sent to all registrants, who were treated to a virtual seminar hosted over Instagram Live by OWB Education Director Bree Stock MW.

## South Korea

We also changed our focus to consumer marketing and PR in South Korea to promote the wines already in this market during these unprecedented times. In addition to online and print promotions, a series of small master classes was conducted—including a small in-person session—with a total of 114 trade attending. More than 450 people were vying for these coveted spots, a good sign that Korea will be ready for a return to in-market programming post-pandemic.

## Japan

In winter 2020, OWB, together with Washington State Wine, launched a foundation-level Northwest Wine Certification education program to grow understanding of the region and create global ambassadors. This spring we hosted the second year of the program in Japan, albeit virtually. An intense two-day seminar was attended by 27 eager wine professionals who passed their exams to become Northwest wine ambassadors. An advanced certification program is in development and will be delivered in 2022.



## Scandinavia

In Sweden, we shifted our focus to consumer and PR efforts. In response, we worked with a local partner to secure print advertising as well as start a social media campaign to promote Oregon wines.

In Denmark, the Northwest Wine Coalition hosted in-person programming in June. NWC partnered with the California Wine Institute to host an outdoor consumer tasting in Copenhagen, which was incredibly well-attended with over 450 consumers eager to have access to Oregon wines. This was followed by a Northwest wine master class given by Madeleine Stenwreth MW. The seminar was attended by more than 50 key wine trade in Copenhagen and was followed by a small importer tasting for those wineries looking for representation.

## Mexico

We were unable to host our planned tour in Mexico once again, but we hosted a small series of highly targeted master classes to generate excitement for our eventual in-person return. The master classes were all over-capacity and reached an audience of 50 key decision makers in Mexico City, Cancun, and Puerto Vallarta. The demand for Oregon Wine is growing in this new target market.



## Update on in-person programming

We had no choice but to postpone programming planned in most of our key markets including Toronto, Montreal, Vancouver, Calgary, Mexico City, Puerto Vallarta, Cancun, and Stockholm. ProWein was once again postponed as were our inbound tour coinciding with Oregon Pinot Camp and a scheduled U.K. sommelier tour. Fortunately, we were allowed to roll over most funding, which will allow us to resume our robust calendar for both inbound and in-market activities once it is safe to do so. We will leverage this funding as much as possible in order to continue to promote the quality and reputation of Oregon Wine around the globe in the meantime.



## STRATEGIC PRIORITY 4: INSIGHTS & INTEGRATION

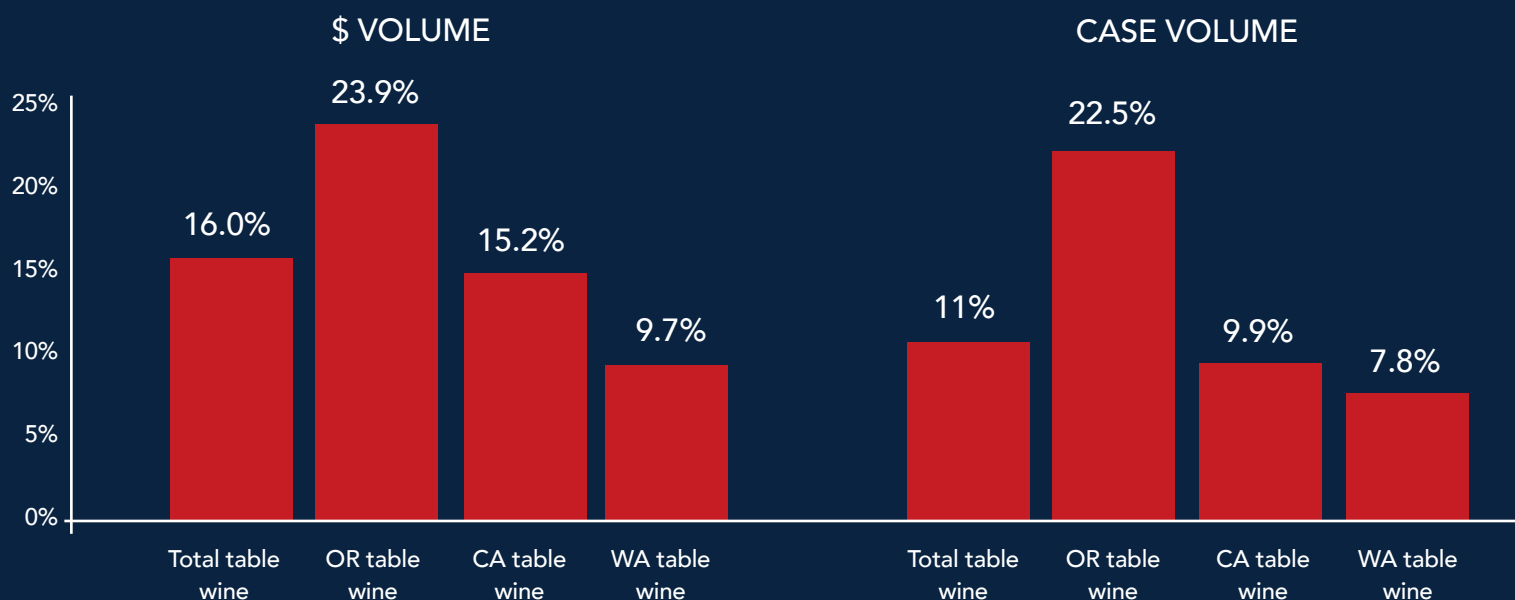
Enrich industry intelligence, dialogue, and alignment.

### MARKET INSIGHTS: NATIONAL RETAIL SALES REPORT

During 2020, stay-at-home policies and restaurant closures resulted in dramatic channel shifting for wine. The retail channel benefitted heavily, with off-premise wine sales jumping from roughly flat growth heading into 2020 to the 30% range in March, April, and May compared to the previous year.

To review how Oregon Wine performed in this unusual retail environment, OWB commissioned Nielsen data and published a [market insights report](#). The analysis included a snapshot of 18 U.S. markets and five retail price segments. Even amid atypical market conditions, Oregon continued to outpace both the overall table wine category and other major wine producing states. The report was published on our industry website in March and disseminated to the industry for Oregon wineries to use in conjunction with other market intelligence for crafting presentations and developing business plans.

### Nationwide category growth in retail outlets, 2019-2020

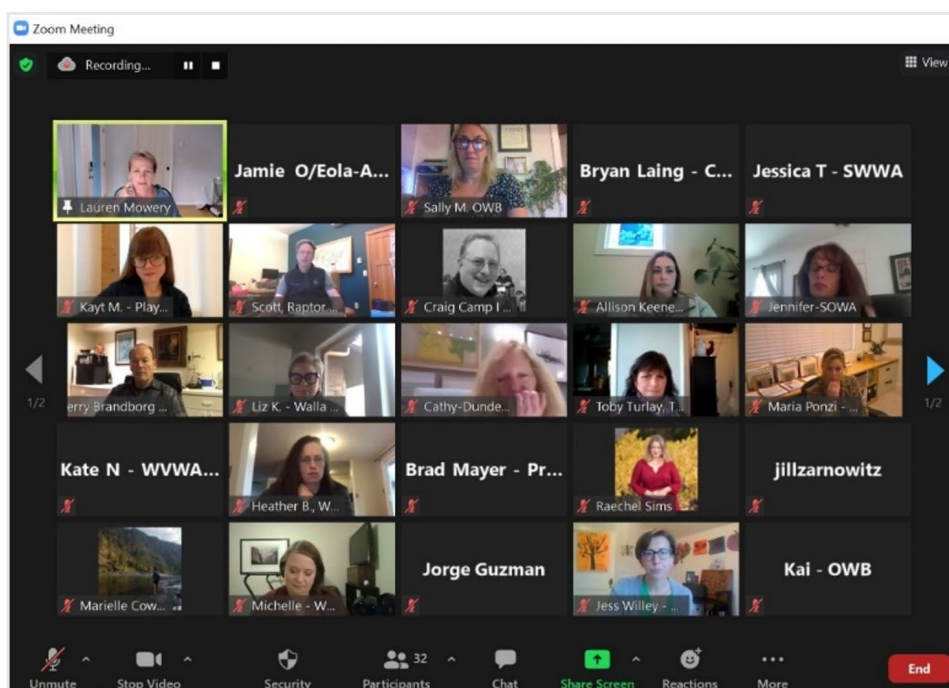


## INFORMATION SHARING TASK FORCE

The Information Sharing Task Force (ISTF) is a network of association leadership that meets annually, and throughout the year is called upon to share timely news and opportunities with their constituents. OWB reaches out to this group of 49 people on an almost weekly basis, sharing media roundups, wine submission opportunities, media talking points, calls for survey participation, reminders to enroll in marketing programs, and more.

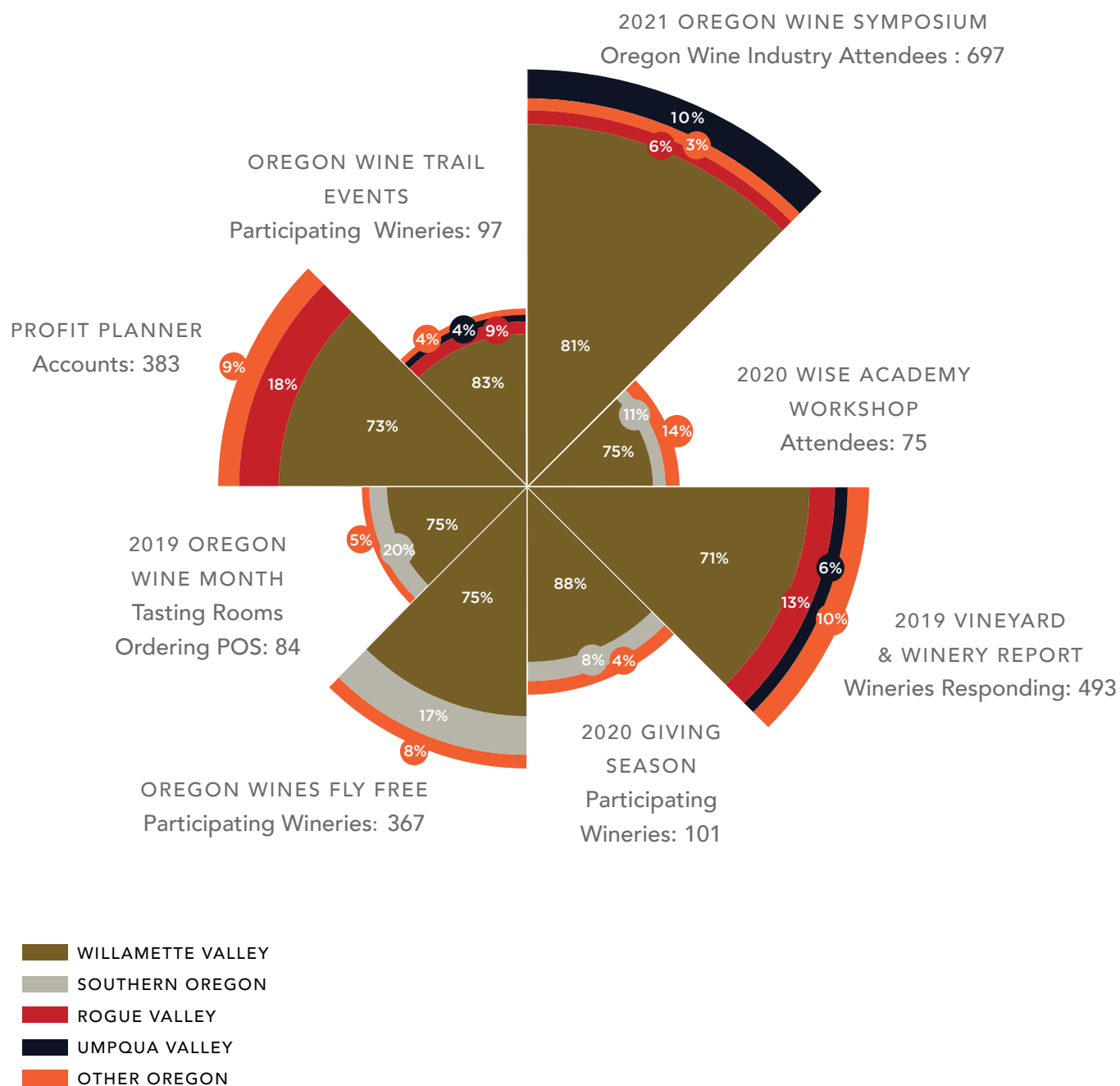
November's ISTF meeting was one for the history books, as it was held virtually. For the 33 people in attendance, we made the gathering feel more personal by shipping each person a lunch of Oregon-made products. Leadership from AVA associations provided brief regional reports to promote cross-region idea sharing. Representatives from Vive NW, which specializes in marketing that reaches the Hispanic market in Oregon, spoke about their services and how they work with Travel Oregon.

Consistent with ISTF meetings over the past four years, we provided insight into the life and times of a writer, this time Lauren Mowery. Lauren is currently writing a book on intentional wine travel—it will include a section on Oregon—and she also writes for *Forbes*, *Wine Enthusiast*, *Saveur*, and *SevenFifty Daily* among a host of other wine and lifestyle publications. Lauren told ISTF members about her experiences with wine regions and wineries that do things right along with and dos and don'ts of submitting samples and pitching stories to writers.



## INDUSTRY PROGRAM ENGAGEMENT BY REGION

This chart illustrates the level and geographical distribution of participation in a variety of Oregon Wine Board programs.





## STRATEGIC PRIORITY 2

# Deliver knowledge & insights.

The Oregon Wine Board will advance collective intelligence in support of growing, making, and selling quality wines.

## Industry education

### OREGON WINE SYMPOSIUM

The OWB develops and delivers the most comprehensive industry education program to wine industry members across Oregon, the Pacific Northwest, and—in 2021—globally. The Oregon Wine Symposium is the premier wine industry education event and the 2021 program was reimagined to accommodate COVID-19 gathering restrictions. The February event was expanded to deliver educational content over four days in a virtual format.

The newly developed programming and platform proved to be the most equitable Symposium offering yet, increasing regional and global attendance and delivering the highest rated Symposium to date. The event delivered the greatest geographic diversity of presenters with subject matter experts presenting from more than 10 countries. The lineup each day featured presentations from OWB-funded researchers, and these presentations along with all of the seminars are available free to all on our [industry website](#).

The post-event survey reflected input from 400 attendees, a response rate of 36%. Despite slightly lower than usual overall attendance, the comments were positive and focused on the high quality of content, the ability to bring in a more diverse



group of speakers from around the world, and easier access to more sessions. The virtual platform uniquely delivered on feedback from previous years with attendees bemoaning the need to choose between popular simultaneous seminars.

The 2022 event will remain a primarily virtual program to continue the OWB's commitment to broad industry access, delivering insights and knowledge from the most experienced researchers globally, building industry partnerships, and increasing equity.

## BUSINESS PLANNING RESOURCES

### Profit Planner

Supported by the OWB's partnership with global wine industry experts Wine Business Education, the Oregon Wine Profit Planner is available free to Oregon growers and producers—a \$360 annual value for each business. The web-based workbooks guide Oregon grape and wine businesses through the supply and value chain decisions that affect a business's financial success in growing, making, and selling wine. There are currently 346 registered users.

The Profit Planner comprises six workbooks:

Vineyard P&L and Cash Flow	Wine Pricing Calculator
Winery Cost of Goods	Marketing, Sales, & Portfolio Management
Blending Profitability	Tasting Room Profitability

### Distribution toolkit

One of the most highly rated seminars from the Oregon Wine Symposium was developed into a [distribution toolkit](#) by some of the Oregon wine industry's most experienced national sales directors. The toolkit hosts the recording of the seminar "[Demystifying Wine Distribution](#)," presented by Jeff Lewis and Colin Eddy, and features four workbooks to accompany the recorded session. These include an assessment of market types, a glossary of key distribution terms, a distributor onboarding checklist, and an FOB-to-BTG pricing grid. This toolkit accompanies the Profit Planner to successfully guide forecasting and national distribution strategies.

## Viticulture & enology research

Among the most critical dimensions of the OWB's research mission are the investments made to improve grape cultivation or wine quality—that is, research in viticulture and enology.

### GRANT PROGRAM

In fiscal year 2020-2021, OWB committed \$343,567 to eight highly ranked viticulture and enology projects, reviewed and recommended to the OWB by its Research Committee comprised of volunteers from across the state. The topics of these projects range from highly pervasive grapevine trunk diseases, to the impacts of berry size on wine quality, to optimizing water management in vineyards, to clever new strategies for optimizing wine fermentations.

An important corollary of the Research Committee's work is maintaining close collaborations with research funding organizations in neighboring states. These relationships enable OWB to extend the range of projects funded and the efficiency of the tax receipts dedicated to scientific research.

### Wildfire smoke response

In addition to considering grant applications submitted by academic investigators, OWB will when necessary initiate projects arising from emergency conditions. In response to the intense pressure of the September 2020 wildfires, the Research Committee recommended—and OWB Directors approved—an immediate allocation of \$37,500 for a collaboration with the Erath Family Foundation to collect grape samples, strengthen smoke effects testing capabilities of scientists at OSU, and build a statewide smoke effects database. This is intended to form a mineable database that can be built on in future non-smoke impacted vintages.

## 2020-2021 FUNDED RESEARCH

The OWB makes substantial efforts to publicize the results of its research program in regular dedicated emails, webinars, the Oregon Wine Symposium, and on the OWB's website. Summaries of funded research projects can be found [here](#).

Federico Casassa, Associate Professor, Department of Wine and Viticulture, California Polytechnic State University San Luis Obispo

*Chemical and sensory effects of intrinsic variations of berry size in Vitis vinifera L. cultivars*

[Read update](#)  




Laurent Deluc, Associate Professor, Department of Horticulture, Oregon State University

*Developing an efficient DNA-free, non-transgenic genome editing methodology in grapevines*

[Read update](#) 

Alexander D. Levin, Assistant Professor, Department of Horticulture, Oregon State University

*Determining optimal irrigation initiation time*

[Read update](#)   

Achala KC, Assistant Professor, Department of Botany and Plant Pathology, Oregon State University

*Grapevine trunk diseases in Oregon vineyards: A pilot project on epidemiology and management*

[Read update](#)  

Walt Mahaffee, Research Plant Pathologist, USDA-ARS-HCRL

*Botrytis bunch rot: Who, where, when, and what to use*

[Read update](#)   


James P. Osborne, Associate Professor and Enology Extension Specialist, Department of Food Science and Technology, Oregon State University

*Utilizing malolactic fermentation as a tool to prevent Brettanomyces bruxellensis wine spoilage*

[Read update](#)  

Patricia Skinkis, Professor and Viticulture Extension Specialist, Oregon State University

*Characterizing Willamette Valley soil moisture and grapevine response under drying seasonal conditions*

[Read update](#)   

Patricia Skinkis, Professor and Viticulture Extension Specialist, Oregon State University

*Rootstock effects on mature Pinot noir growth and productivity under cool climate, dry-farmed conditions*

[Read update](#)  



Wine Quality



Sustainable Production



Climate Change



Foundational Research



## Industry insights

### VINEYARD & WINERY REPORT

In September, OWB published the [Vineyard & Winery Report](#) for 2019, providing an overview of the harvest and illuminating growth within the Oregon wine industry over the preceding year. For the third year, data collection and analysis were conducted by a team of researchers at the University of Oregon's Institute for Policy Research and Engagement.

## 2019 Oregon Vineyard & Winery Report

### WINE GRAPES

Planted Acreage

**37,399**  
acres



Production

**105,586**  
tons



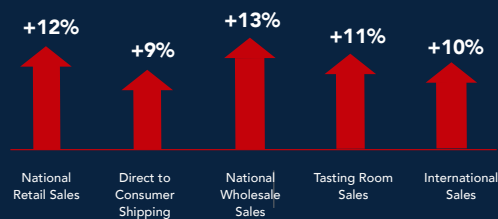
Value of  
Production

**\$237.8 M**



### SALES

Sales growth across channels reflected the increasing demand for Oregon wine.



Lorem



Source: 2018 and 2019 Oregon Vineyard and Winery Report, University of Oregon's Institute for Policy Research and Engagement (IPRE), Nielsen

## Economic impact study

Every three years, OWB commissions a comprehensive study to examine the impact of the wine and wine grape industries on Oregon's economy. It evaluates revenues, jobs and wages derived from sectors ranging from core businesses of grape growing and wine production as well as others like distribution and tourism. It also evaluates the impact of the next layer of related businesses, including suppliers and service providers, and finally incorporates the impact of employees within the complete supply chain spending their earned wages.

Ordinarily this report is a one-year snapshot, enabling trend comparisons to previous periods. Originally intended only to examine 2019, the study was expanded to assess 2020 given the unusual market and production conditions presented by COVID and the fall wildfires.

The report, published in January, can be found [here](#) on the OWB's industry website. It was produced by Dr. Robert Eyler of Economic Forensics & Analytics and Christian Miller of Full Glass Research, who presented their findings at the Oregon Wine Symposium in February. The recording of that session is posted [here](#).

### Economic Impact of Wine in Oregon 2019 & 2020



**\$7.21B**

Statewide economic impact  
of wine industry in 2019



**27.2%**  
increase since 2016



**40K**

Wine-related jobs in 2019



**34.7%**  
increase since 2016



**\$894M**

Contribution of wine-related  
tourism to state economy in



**13.6%**  
increase since 2016



**\$184M**

Local and state taxes due to wine-  
related activity in 2019



**18.2%**  
increase since 2016



**\$1.48B**

Estimated 2020 decline in total  
economic impact



**-20.5%**  
decrease since 2019

Source: Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy 2019-20



### STRATEGIC PRIORITY 3

## Provide leadership & partnership.

The Oregon Wine Board will harness statewide strength to unite and empower the Oregon wine industry.

### Industry relations

#### ONLINE FORUMS

Evolving from a series of weekly industry Zoom meetings instituted in spring 2020 focused specifically on coping with the impacts of COVID-19, OWB now hosts monthly discussion forums centered on the topics of marketing, education, and research within the Oregon wine industry. These are open to all industry members and serve as an interactive platform to stay current on industry trends, connect with industry members across the state, and stay informed on OWB programming and opportunities.

These meetings enjoy an average attendance of about 50 industry members, primarily comprised of association leadership from around the state. Standing topics include updates from OWB and regional associations as well as news from industry advocacy groups. Guests have included Travel Oregon associates, market researchers, research scientists, representatives from OLCC and Oregon OSHA, among others. Meeting recordings and associated documents can be found [here](#).

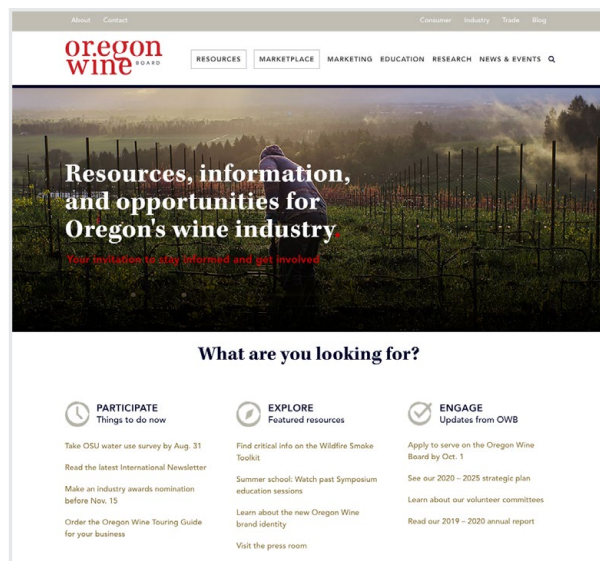
#### DIGITAL COMMUNICATIONS CHANNELS

##### Website

The OWB's [industry website](#) serves as a hub for OWB's industry-facing offerings, opportunities, and resources. It includes toolkits with guidance on taking advantage

of OWB's marketing programs, a vast library of educational content, summaries of viticulture and enology research projects, and much more. Over the course of the year, 31,559 people visited the industry website for an average duration of 1 minute 52 seconds.

In the spring, the industry website was updated to bring its back-end functioning in line with the consumer-facing website, increasing site security and improving site maintenance cost efficiencies across OWB's network of websites. At the same time, the site was reskinned to reflect the new Oregon Wine brand identity while incorporating enhancements to the user experience to improve finding of the latest and most pertinent content.



## Email

The Grapevine Newsletter is the primary way OWB disseminates timely information of interest to vineyard and winery managers. It reaches roughly 2,200 members of the Oregon wine community on a biweekly basis. The newsletter had a commanding average open rate of 33.3% and a 5.7% clickthrough rate, evidence of the value this resource provides the industry. Ad hoc emails specific to time-sensitive news and opportunities are also distributed to this list. Industry members who would like to be added to OWB's distribution list can sign up [here](#).

## Social media

The OWB also hosts a Facebook Group called the [Oregon Wine Industry Collaboration Space](#). This group is restricted to members of the Oregon wine industry had 884 members at the end of June—a 16% increase over last year. The forum provides an opportunity for the Oregon wine community to interact on topics important to them while offering OWB an additional channel to share important messages.



## INDUSTRY ASSOCIATION GRANT PROGRAM

New in the 2020-21 fiscal year, the OWB initiated a process to accept requests from Oregon-based wine industry not-for-profits (NFPs) of up to \$500. The grants are intended to assist in funding activities that support each NFP's unique mission. Funds can be used for purposes approved by the NFP's Board, and could include professional grant writing assistance, reimbursements for expenses incurred by visiting members of the media, or engaging academics on a project of importance to the NFP. Grant money can also be directed towards other activities as requested by an NFP's Board insofar as such activities are consistent with OWB's emphasis on Research, Education, Media Relations, and Marketing programs.

### Grants awarded

Yamhill-Carlton Winegrowers Association

\$500 awarded to cover costs of a farm lunch during the Wine Media Conference.

Umpqua Valley Winegrowers Association

\$500 awarded to put towards the association's website splash page to direct potential customers to its website, social media outlets, and brochures.

Eola-Amity Hills Winegrowers Association

\$500 awarded to assist with writing local and statewide grant applications to update photo and video assets on social media channels and website.

In addition, OWB granted \$1,000 to each of the following associations to offset costs of hosting media in conjunction with the August 2021 Wine Media Conference.

Columbia Gorge Winegrowers  
Association

South Willamette Wineries  
Association

Ribbon Ridge Winegrowers

Umpqua Valley Winegrowers  
Association

Rogue Valley Vintners

Yamhill-Carlton Winegrowers  
Association

## Covid-19 response and support

In response to COVID-19, OWB aimed to both assist winery and vineyard businesses that were experiencing new hardships as well as look for opportunities presented by the shifting marketplace dynamics.

### TOOLKITS

The OWB's [COVID-19 Oregon Wine Industry Toolkit](#), launched March 2020, continues to serve as a go-to library stocked with legal and regulatory advisory documents, research, media resources, promotional support program details, and recorded webinars. Throughout the year, the page was viewed more than 1,200 times for an average of 3 minutes 24 seconds.

To keep consumers aware of the changing patchwork of COVID-related closures and restrictions, we also published a [COVID-19 toolkit at oregonwine.org](#). This toolkit shared information and resources from partners such as the Oregon Health Authority, Travel Oregon, and the governor's office, and was designed to empower consumers with up-to-date information so they could make informed decisions about visiting wine country. The toolkit was updated at least as frequently as the governor's risk assessments changed and, when needed, more often. Consumers logged more than 14,000 pageviews during the year. While only 6% of site visitors accessed the page, those who did spent on average 2 minutes 20 seconds on the page.

### MARKETING PROGRAMS

#### Oregon Vine Perks

Beginning mid-March 2020, the OWB hosted industry forums to discuss the challenges, opportunities, and very complicated questions that had arisen in response to the COVID-19 crisis. During one marketing-focused call two urgent questions emerged: how can Oregon wineries sell more wine online now? And, how can we ensure our tasting rooms are busy as soon as we reopen? The Oregon Vine Perks rewards program was developed as a response to both.



Consumers who purchased \$250 or more in Oregon wine from a winery, grocery, wine shop, restaurant cellar sale, or website qualified for Oregon Vine Perks and received a membership card. The card was redeemable through April for 2-for-1 tastings, special events, cheese plates, discounts, and other benefits. The program enrolled 154 participating wineries and issued 667 membership cards. Representing at least \$250 in spending, the consumer members represent more than \$166,000 in Oregon wine spending.

Community support has always been central to the Oregon wine industry's success. So, the Oregon Vine Perks program included a \$5,000 donation to the Oregon Food Bank. In addition, the program was run in partnership with VinBound Marketing in Carlton, who offered their services at cost as a courtesy to the industry during such a difficult time.

In addition to paid promotion and communications through our owned channels, we supported this program with two press releases. This drove more than 160 articles on the program, reaching nearly 6 million people.

### **The Giving Season**

Developed in collaboration with regional associations around the state, The Giving Season was an online sales promotion designed to connect holiday shoppers with Oregon wineries. Businesses were invited to enroll and elect the promotion or offer that worked best for them. The campaign ran from late October through New Year's Eve.

More than 100 wineries enrolled and details for all were hosted at oregonwine.org. A paid social media and Google search campaign directed buyers to the program's landing page where they could shop offers by region before clicking through to purchase directly from an individual business. Our paid campaign generated 745,000+ impressions, 7,800+ page visits, and 1,990 outbound clicks directly to wine businesses. The top five winery recipients each received more than 60 website visits as a result of the promotion.



## RESEARCH INTO THE IMPACT ON TASTING ROOMS

In early November, Oregon's governor announced a two-week "freeze" on indoor dining, which impacted tasting room operations. At the request of industry advocacy groups, OWB organized a survey of the industry to estimate the anticipated impact of this freeze on businesses heading into the weekend preceding Thanksgiving—historically one of the busiest of the year for tasting room visitation. Our analysis scaled up the collected data to estimate lost sales as well as lost employment from tasting rooms. It also assessed the significant investments businesses made in infrastructure to operate in a safe way during the pandemic, from heat lamps for outdoor patios to new ventilation systems. These figures were used to support arguments asking the governor to allow limited on-site tasting during this important period.

## Wildfire response and support

In the first weeks of September, just as Pinot noir and Chardonnay were reaching harvest ripeness in the Willamette Valley, wildfires erupted on the western slopes of the Cascade Mountains and Eagle's Bluff, sending extreme conditions of heat, wind, and smoke into the valley. In addition to worries over the impact of smoke on grapes and wine at such a vulnerable time in the vintage, the conditions brought heightened concerns over the health and safety of workers, who were already contending with the dangers presented by the COVID-19 pandemic. Similar to our pandemic response, OWB quickly identified opportunities to support the industry with information, resources, and community at a time of great need.

## TOOLKIT

One of our first actions was to launch a [Wildfire Smoke Toolkit](#) on the industry website, providing a repository of timely resources. The toolkit includes research articles and recorded webinars from global producers and academics. It also links to options for having grapes or wines tested, information on insurance, and suppliers of personal protective equipment. Communication tips and talking points around this sensitive topic are provided as well, as discussed on page 10. During September and October, the toolkit had over 850 views with people spending nearly 3 minutes 30 seconds on the page on average.

## EDUCATION

Over the course of a week in September, the OWB hosted three online forums to connect industry members to experts and pertinent information to help inform



their harvest and crush decisions. The first was a recorded conversation with Senior Oenologist Matt Holdstock from the Australian Wine Research Institute. The second was a roundtable conversation featuring research scientists, a representative from USDA's Risk Management Agency, and winemakers experienced in working with smoke-affected grapes. Lastly, OWB hosted a conversation with scientists and legal experts about the fire and smoke-related challenges faced by growers and winemakers. Recordings can be found on the toolkit.

## GRAPE TESTING

With laboratories equipped to test for smoke impacts already filled to capacity by California businesses, OWB helped the industry overcome obstacles to getting grapes tested by partnering with Oregon State University researchers. As described on page 26, the OWB contributed funding along with Erath Family Foundation for researchers to coordinate sample collection and conduct testing of grapes from across the state.

## RESEARCH ON IMPACTS TO VINEYARD BUSINESSES

Finally, as part of an initiative led by the West Coast Smoke Exposure Task Force to quantify the monetary impact of fires and smoke on vineyards, the OWB led the collection and analysis of data in Oregon. Of the 118 vineyards responding—representing about 25% of Oregon's planted vineyard acreage—nearly 60% reported taking price reductions on grapes, having fruit rejected or left hanging, or both. This data armed associations engaged in federal advocacy work to lobby congressional lawmakers for relief for growers.

## DEI commitments

As part of OWB's [commitment to change](#), published June 2020, all staff and Board members embarked on a five month calendar of coursework to address diversity, equity, and inclusion topics with Clinton Street Consulting. All nine board members and eight staff completed six virtual workshops and associated assignments to build awareness and communication effectiveness in response to social justice initiatives across the U.S. in 2020 as well as the Oregon Solutions industry assessment observations.

As an extension of this work, OWB worked with Linfield University Professor Dr. Jeff Peterson and local wine industry non-profit organization Assemblage to develop and distribute an Oregon wine industry labor and DEI survey. The results were presented at the Oregon Wine Symposium alongside a panel of DEI coaching professionals. The session can be viewed [here](#).

## Financial overview

This past year presented a challenge for most business and organizations, including the Oregon Wine Board. The grape assessment income was 14% below budget due to the lower tonnage from the 2020 harvest. This decline impacted the available funding by approximately \$400,000. Anticipating this decline in income, we made quick adjustments to planned spending to maintain essential programming and the organization's financial stability.

We continued to supplement our marketing programming with a new Wine County License Plates Grant for the development of a new brand identity; the remaining funding from a Specialty Crop Block Grant for trade education; a special allocation from the Oregon legislature for market access and research programs; 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 \$2.2 million, of which about 8% came from grants and program-related funding sources.

Despite the declining income in 2020-21, OWB management and directors continued their important work developing marketing and media programming, funding research grant awards, and expanding educational offerings. The Board of Directors enhanced the technical research grant funding pool with a special allocation of \$37,500 for smoke research in response to unprecedented harvest conditions. In response to COVID-19 pressures, we shifted delivery of the annual Oregon Wine Symposium to a successful virtual format, which provided a small positive net income for the first time.

Anticipating declining income, we reduced expenses by 19%, mainly by shifting away from market expansion programming and instead focusing on delivering media relations, tourism, branding development, and trade education programming. Grant funds for an Oregon Wine Trail tasting event planned for Seattle in May 2020 were repurposed for a virtual education program delivered in February 2021. In making spending adjustments in market expansion, we preserved our existing commitments to research grant funding and, in fact, increased it by 10% to accommodate necessary smoke research.

We continued to administer the annual Vineyard and Winery Survey and introduced a grant program in support of the state's regional wine marketing associations.

By keeping a sharp eye on general and administrative expenses, we decreased spending by 9% by cutting back on meeting, travel, and office expenses. We expect to continue to lower general and administrative costs through 2021-22.

## FINANCIALS

INCOME	BUDGETED	ACTUAL
Grape Assessment (\$25/ton)	1,950,820	1,681,904
Wine Tax (2¢/gal)	310,242	328,641
Symposium Income	13,680	(36,825)
Program Income	150,000	112,326
Grant Funds (excluding MAP)	50,000	58,163
HB5006 Funds - MARIS	96,898	40,000
Other Income	5,000	1,968
<b>TOTAL INCOME</b>	<b>2,576,640</b>	<b>2,186,177</b>
EXPENSE	BUDGETED	ACTUAL
<b>RESEARCH</b>		
Viticulture & Enological Research Grants	350,000	343,567
Special Grant - Smoke Research	37,500	37,500
Online V&E Knowledge Center	20,000	-
Compensation, Admin and Travel	58,090	44,564
<b>TOTAL RESEARCH</b>	<b>465,590</b>	<b>425,631</b>
<b>EDUCATION</b>		
Symposium Programming	150,000	96,486
Other Industry Workshops	25,000	3,320
Compensation, Admin and Travel	59,820	66,468
<b>TOTAL EDUCATION</b>	<b>234,820</b>	<b>166,274</b>
<b>MARKETING &amp; COMMUNICATIONS</b>		
Brand Equity & Identity	148,500	107,566
Tourism	165,000	126,637
Market Expansion	331,398	181,088
Communications & Media Relations	182,099	179,164
Compensation, Admin and Travel	232,300	194,049
<b>TOTAL MARKETING &amp; COMMUNICATIONS</b>	<b>1,059,297</b>	<b>788,504</b>
<b>KNOWLEDGE &amp; INSIGHTS</b>		
Industry Research	96,500	100,710
Marketing Research	30,000	7,519
Compensation, Admin and Travel	45,090	39,221
<b>TOTAL KNOWLEDGE &amp; INSIGHTS</b>	<b>171,590</b>	<b>147,450</b>
<b>LEADERSHIP &amp; PARTNERSHIP</b>		
Regional Meetings	10,000	-
Information Sharing Task Force	2,000	-
Grant Writing	10,000	500
Program Sponsorship	10,000	6,000
Industry Relations	47,500	21,862
Compensation, Admin and Travel	51,090	39,446
<b>TOTAL LEADERSHIP &amp; PARTNERSHIP</b>	<b>130,590</b>	<b>67,808</b>
<b>GENERAL &amp; ADMINISTRATION</b>		
Board Administration	20,000	4,026
Compensation, Admin and Travel	828,860	771,180
<b>TOTAL GENERAL &amp; ADMINISTRATION</b>	<b>848,860</b>	<b>775,206</b>
<b>TOTAL EXPENSE</b>	<b>2,910,747</b>	<b>2,370,873</b>

## Industry awards

Each year, the industry recognizes individuals for their contributions to the Oregon wine industry. Below are those who were honored in 2021 in virtual presentations at the Oregon Wine Symposium.

Nominations are accepted year-round through the [industry website](#).

### OUTSTANDING INDUSTRY LEADERSHIP AWARD

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

**Leigh Bartholomew, Director of Viticulture,  
Results Partners**

**Anthony King, Owner, King Wine Consulting**

**Mike McNally, Co-owner, Fairsing Vineyard**

### 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.

**Doyle Hinman, Owner, DW Hinman Cellars**

### 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.

**The team at OSU's Oregon Wine  
Research Institute**

**The team at Davis Wright Tremaine**

### BOARD SERVICE AWARD

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

**Kevin Chambers, Co-owner, Koosah Farm**

**Barbara Steele, Co-owner, Cowhorn Vineyard  
and Garden**

### LIFETIME ACHIEVEMENT AWARD

Recognizes individuals whose extraordinary dedication, inspiration and advocacy for the Oregon wine community span a personal lifetime.

**Kevin & Carla Chambers, Co-owners,  
Koosah Farm**

### 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.

**Antonio Mendez-Leon, Vineyard Manager,  
Eola Hills Wine Cellars**

**Esteban Ramos, Field Operations Manager,  
Croft Vineyards**



## Board members



DONNA MORRIS  
Chair  
Winderlea Vineyard and  
Winery



BOB MORUS  
Chair Emeritus  
Phelps Creek Vineyards



HILDA JONES  
Vice Chair  
Abacela Vineyards and  
Winery



JUSTIN KING  
Treasurer  
King Estate Winery



REMY DRABKIN  
Remy Wines



BERTONY FAUSTIN  
Abbey Creek Vineyard



EUGENIA KEEGAN  
Jackson Family Wines



DENNIS  
O'DONOGHUE  
Celtic Moon Vineyards



JASON TOSCH  
Stoller Wine Group

## Management team



**TOM DANOWSKI**  
President



**MARIE CHAMBERS**  
VP Finance &  
Operations



**STACEY KOHLER**  
Executive Assistant



**KAI McMURTRY**  
Marketing Director



**SARAH MURDOCH**  
Communications  
Director



**BREE STOCK MW**  
Education Director



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

## Committees and volunteers

The Oregon Wine Board is indebted to the dozens of community members who volunteer on committees to help plan and produce programming that benefits the entire Oregon wine industry.

### FINANCE COMMITTEE

The Finance Committee provides oversight on financial practices and procedures, previews Board reports, and advises prior to external disclosures.

**Chair:** Justin King, Treasurer

**Vice Chair:** Donna Morris, Board Chair

**Management Lead:** Marie Chambers

### VITICULTURE & ENOLOGY RESEARCH COMMITTEE

The Viticulture & Enology Research Committee consolidates near-term industry input on viticulture and enology research priorities; reviews and recommends applications for funding; and evaluates project progress.

**Chair:** Jason Tosch

**Co-Vice Chairs:** David Beck and John Pratt

**Management Lead:** Jess Willey

MEMBERS:	Jason Cole	Mel Liebeck	Luisa Ponzi
Leigh Bartholomew	Dai Crisp	Anna Matzinger	Tim Scott
Jim Bradshaw	Scott Dwyer	Ryan McAdams	Bruce Sonnen
Terry Brandborg	Chris Graves	Anneka Miller	James Thommes
Robert Brittan	Brian Gruber	Erica Miller	Chad Vargas
Johnny Brose	Gina Hennen	Kathy Miller	Vince Vidrine
Tresider Burns	Allen Holstein	Karl Mohr	Nate Wall
Sarah Cabot	Anthony King*	Michael Moore	Karl Weichold
Ted Casteel	Erik Kramer	Joey Myers*	
Leti Catoira	Bill Kremer	Ray Nuclo	
Elizabeth Clark*	Ken Kupperman*	Dave Paige*	

\*Steering committee member

### EDUCATION COMMITTEE

The Education Committee advises and participates in development of an annual education calendar centered on the Oregon Wine Symposium.

**Chair:** Eugenia Keegan

**Vice Chair:** Bertony Faustin

**Management Lead:** Bree Stock MW

**Symposium Viticulture Track Lead:** Leigh Bartholomew

**Symposium Enology Track Lead:** Anthony King

**Symposium Business Track Lead:** Carrie Kalscheuer

MEMBERS:

**Viticulture & Enology:**

Andrew Bandy Smith

JP Caldcleugh

Kiley Evans

Gina Hennen

Claire Jarreau

Alex Levin

James Osborne

Luisa Ponzi

Nichole Schulte

Patty Skinkis

Emily Terrell

Vince Vidrine

**Business:**

Remy Drabkin

Colin Eddy

Vanessa Hadick

Jeff Lewis

Scott Kelley

Meg Murray

Nicolas Quille

Sofia Torres

Hallie Whyte

## Committees and volunteers, continued

### STRATEGIC MARKETING & COMMUNICATIONS COMMITTEE

The Strategic Marketing & Communications Committee consolidates industry input on strategic programs and priorities.

**Chair:** Donna Morris

**Management Lead:** Kai McMurtry

**MEMBERS:**

Ellen Brittan  
Craig Camp  
Eugenia Keegan  
Justin King  
David Millman  
Amy Prosenjak

### INTERNATIONAL MARKETING COMMITTEE

The International Marketing Committee consolidates industry input on strategic programs and priorities.

**Chair:** Bob Morus

**Vice Chair:** Steve Thomson

**Management Lead:** Marie Chambers

**MEMBERS:**

David Adelsheim	John Gabelhausen	Howard Rossbach
Rob Alstrin	Ryan Harms	Thom Sichta
Shirley Brooks	Doyle Hinman	Alison Sokol Blosser
Randy Ford	Alexandra LaFontaine	Emily Zegar
Jon Foster	David Millman	
	Ryan Pennington	

### INFORMATION SHARING TASK FORCE (ISTF)

The ISTF creates and facilitates awareness, adoption, and engagement of opportunities, activities, key trends, and developments in the Oregon wine community through active communications.

**Management Lead:** Sarah Murdoch

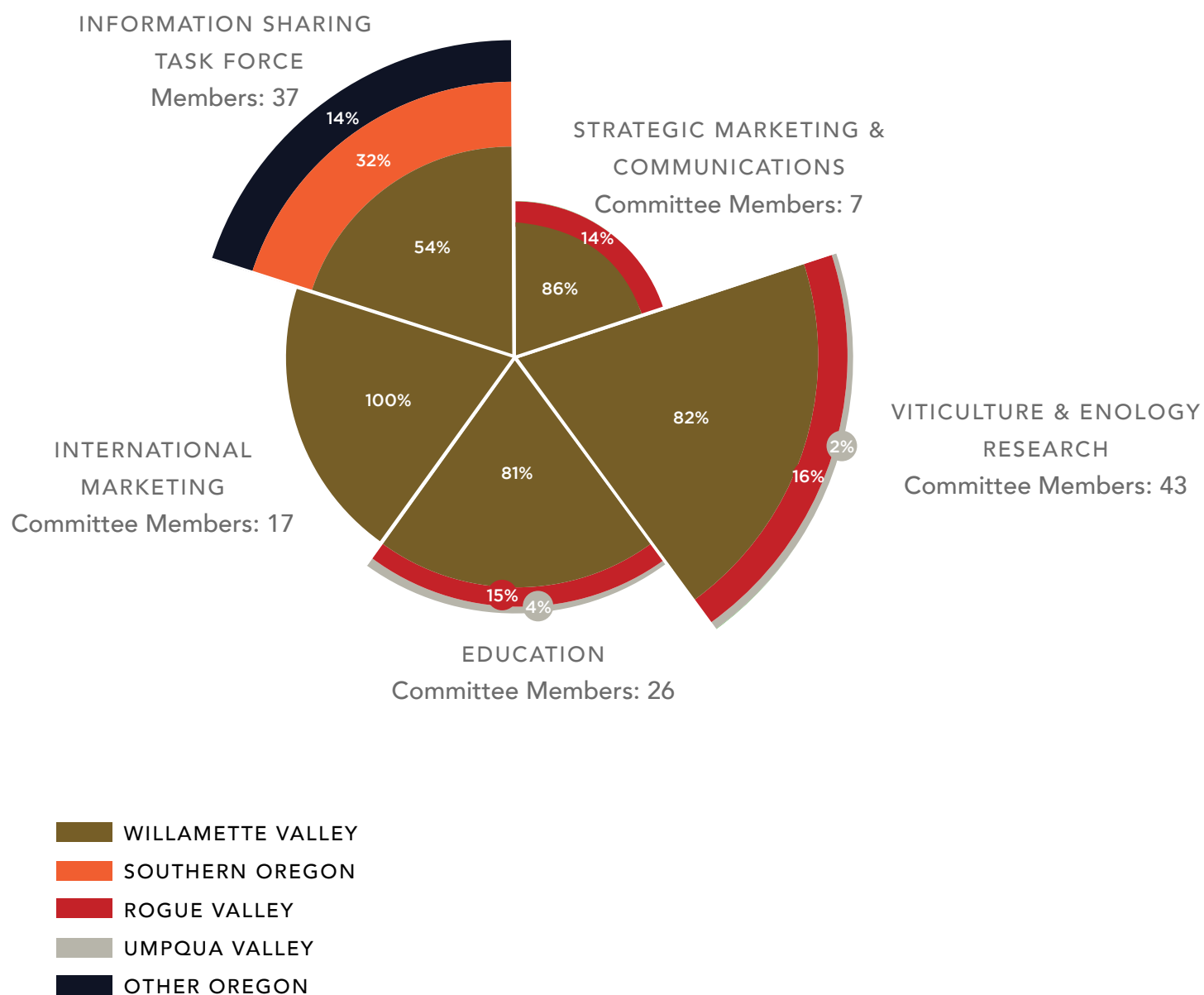
**MEMBERS:**

Ross Allen	Robert Hansen	Cathy Martin	Andy Steinman
Alfredo Apolloni	Jason Hanson	Brad Mayer	Betty Tamm
Gina Bianco	Chris Hudson	Brian McCormick	Jessica Thomas
Terry Brandborg	Jennifer Kerrigan	Morgen McLaughlin	Tom Waliser
Julia Burke	Beth Klinger	Mary Olson	Dan Warnshuis
Craig Camp	Liz Knapke	Luisa Ponzi	Nate Winters
Ariel Eberle	Kim Kolb	John Pratt	Karolyn Wright
Denise Flora	Jean Kurtz	Steve Robertson	Jill Zarnowitz
Joe Ginet	Jack La Rue	Annie Shull	
	Laurie Lewis	Scott Steingraber	

An up-to-date roster of committee leadership and members can be found on the [industry website](#).



## OWB COMMITTEE MEMBERSHIP BY REGION



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