



“ Wine Opinions ”

Oregon Wine Board Consumer Study

December 18, 2015

OBJECTIVES & METHODOLOGY

RESEARCH TARGET:

- ✓ Survey wine consumers who currently drink Oregon wine and potential consumers of Oregon wines.
- ✓ Focus on high end, high frequency consumers who are the highest potential wine consumers for Oregon.

SPECIFIC GOALS:

- ✓ Measure frequency of consumption by variety.
- ✓ Establish familiarity with, and perceptions of, wines from Oregon and competing regions.
- ✓ Profile regular consumers of Oregon wines and highlight any differences with consumers of other Wines.
- ✓ Assess quality and value perceptions of Oregon wines and those from competing regions.
- ✓ Determine familiarity with specific varietals and wine types from Oregon.
- ✓ Investigate Oregon purchase factors and factors that contribute to the purchase of \$20+ wines.
- ✓ Measure wine-related media usage and exposure.
- ✓ Measure and assess reactions to Oregon wine country visitation.

Objectives and Methodology (continued)

RESPONDENT SOURCE: the Wine Opinions national consumer panel. Over 11,000 consumers, mostly high frequency and high involvement in the wine category, with significant portion of high end wine consumers.

- Among all U.S. adults who drink wine, roughly 35% are high frequency wine consumers but they account for over 80% of wine sold.
- Among all U.S. adults who drink wine, roughly 9% are high end wine drinkers, as defined by purchasing wine monthly or more often that costs \$20 or more per 750ml at retail. However, this group is responsible for the vast majority of wine sold over \$20 a bottle.
- 1,106 Wine Opinions consumer panelists participated
- 475 of which were High Frequency, High End wine drinkers (HFHE).

METHODOLOGY: All WO panelists were sent an email invitation to the survey, with a link to the online survey embedded in the invitation. Completion of the survey entered all participants into a lottery for various cash rewards.

RESULTS FILTERED: This presentation covers results from survey participants who

- consume wine on a high-frequency basis (more often than once a week) and also
- buy high-end wine (defined as \$20 or more) at least monthly

Objectives and Methodology (continued)

All questions were cross-tabulated by the following segments:

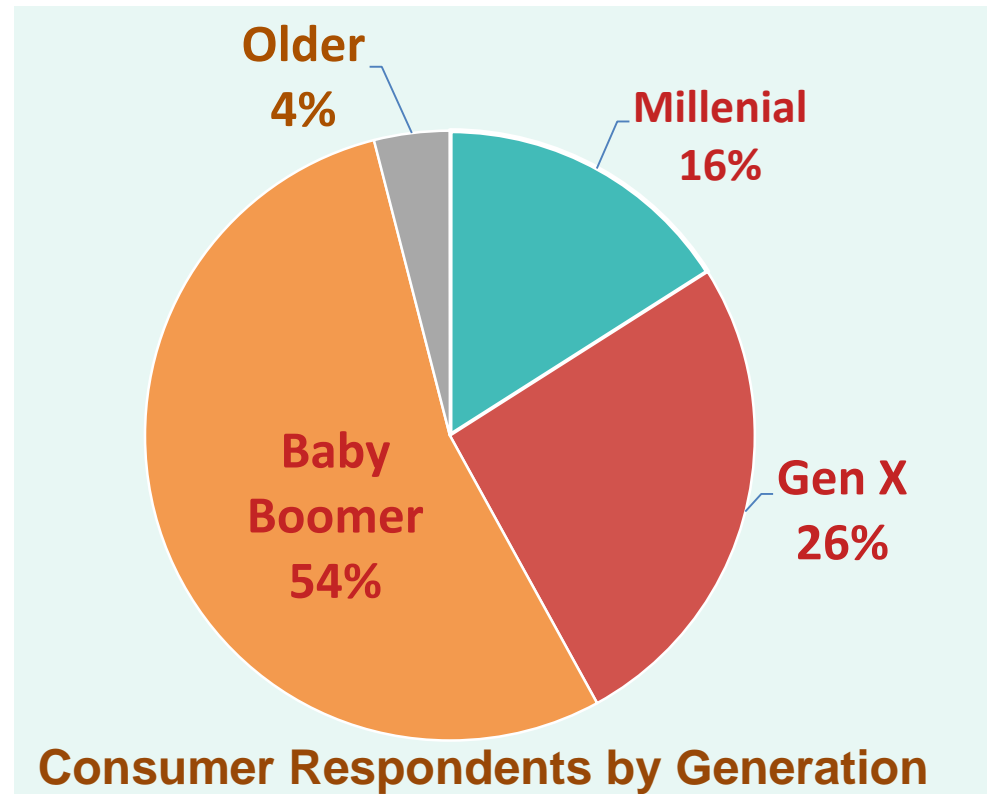
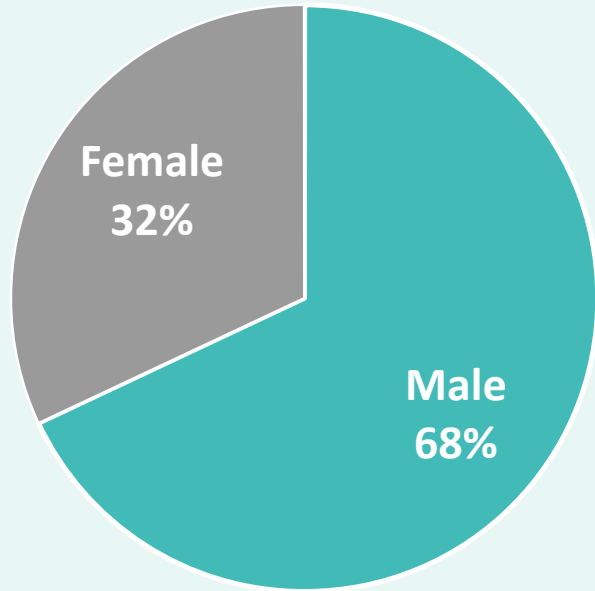
- ✓ Gender
- ✓ Age: a comparison across generations - Millennials (aged 21 – 38); Gen Xers (aged 39 – 50); Baby Boomers (aged 51 – 69); and those 70+.
- ✓ Pinot Noir consumption: a comparison of those who drink Pinot Noir weekly or monthly vs. those who drink it less often or never.
- ✓ Regular Oregon wine purchasers: those who purchase Oregon wine regularly vs. those who do not.
- ✓ Oregon wine country visitation: those who have visited Oregon wine country vs. those who have not.
- ✓ Residents of Oregon or Washington (also referred to as “Northwest”) vs. California vs. all other states.

Where statistically significant results are reported, these have been calculated at a confidence level of at least 90%. For the overall sample, the confidence intervals ranged from approximately $\pm 2.3\%$ - $\pm 3.8\%$.

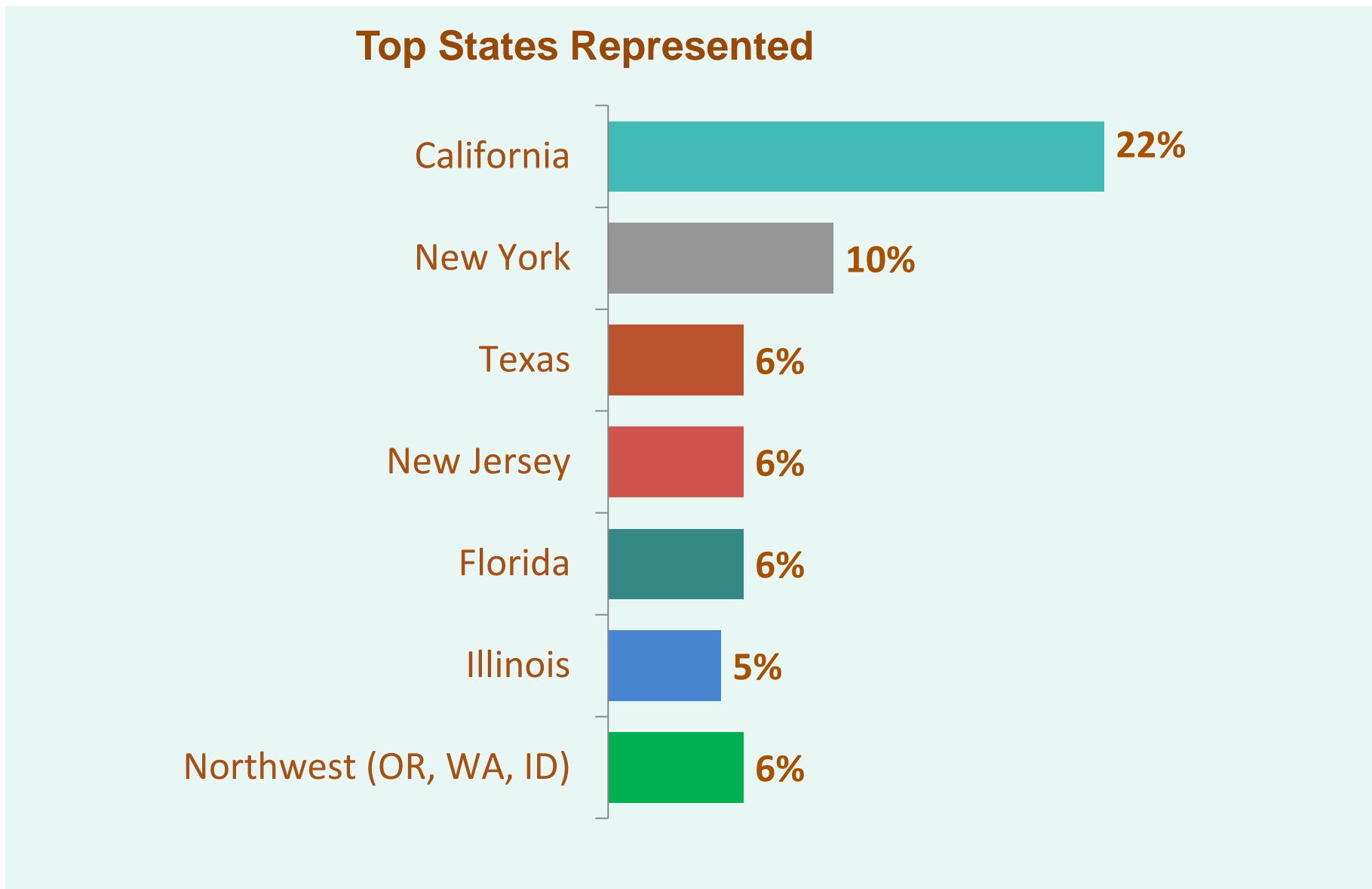


CONSUMER RESPONDENT PROFILE

Consumer Respondents by Gender



Consumer Respondent Profile (continued)



Consumer Respondent Profile (continued)

5. Please indicate how often, on average, you buy wine at a retail store (not restaurant) in these price ranges (per 750ml bottle)?

	WEEKLY	MONTHLY	SEVERAL TIMES A YEAR	LESS OFTEN	NEVER
Under \$10	29%	20%	13%	21%	17%
\$10-\$19.99	50%	34%	8%	8%	1%
\$20-\$29.99	19%	76%	5%	1%	0%
\$30-\$49.99	5%	34%	50%	10%	1%
\$50 and over	2%	16%	42%	34%	7%

Q: Thinking of when you typically buy wines priced above \$20, please rate the following features in terms of importance to your buying decision.

FEATURE	HIGHLY IMPORTANT (5)	(4)	(3)	(2)	Not Important (1)	MEAN RATING
Familiar with region's wines	33%	44%	16%	4%	3%	4.0
Brand/producer have heard of or tried	31%	45%	18%	5%	1%	4.0
Have visited region	29%	28%	20%	10%	15%	3.5
Recommendation from a friend	22%	46%	20%	9%	3%	3.7
Recommendation by a store or restaurant staff	17%	44%	25%	9%	5%	3.6
High scores from a leading wine magazine or critic	10%	36%	30%	17%	8%	3.2
Read about in an article or blog post	10%	34%	34%	15%	7%	3.3
Is priced slightly below other wines I considered	5%	23%	33%	23%	16%	2.8
Made using organic/ sustainably farmed grapes	3%	17%	34%	28%	18%	2.6



7. Are you familiar with and have you tried wines from the regions listed below? Choose the one answer that best represents your experience.

REGION	Buy/Drink Regularly	Tried a number of times	Tried once or twice	Heard of, not tried	Not heard of
Napa Valley	68%	28%	3%	0%	1%
Sonoma County	66%	28%	4%	2%	1%
Oregon	40% → 33%	47%	14%	4%	2%
Willamette Valley	38% → 33%	42%	14%	4%	8%
Washington	11% → 32%	48%	15%	3%	2%
Walla Walla Valley	17%	37%	23%	10%	13%
Southern Oregon	9%	39%	28%	12%	13%
Columbia Gorge	9%	34%	25%	13%	19%

PN drinkers
 40% →
 38% →
 11%

Media Interaction

15. How often do you read the following publications or visit their website?

PUBLICATION OR WEBSITE	WEEKLY+	1-3 TIMES A MONTH	OCCASION ALLY	RARELY OR NEVER
Wine Spectator	26%	28%	33%	13%
Wine blogs or discussion groups	18%	23%	29%	31%
Food & Wine	15%	30%	36%	19%
Wine-Searcher.com	14%	13%	26%	47%
Wine Enthusiast	14%	34%	35%	19%
The wine column in my local newspaper	12%	18%	23%	48%
The Wine Advocate	9%	19%	41%	32%
Wine.com	8%	16%	39%	37%
WineFolly.com	8%	5%	15%	72%
Wine & Spirits	6%	16%	34%	43%
Snooth	5%	9%	24%	60%



16. How often do you visit, post or exchange information or images about wine on the following social media sites?

SOCIAL MEDIA (wine use only)	DAILY	SEVERAL TIMES A WEEK	1-4 TIMES A MONTH	LESS OFTEN	DON'T USE
Facebook	13%	18%	23%	27%	20%
Twitter	6%	8%	9%	25%	52%
Instagram	5%	7%	12%	17%	59%
Pinterest	4%	4%	7%	20%	65%
Delectable	2%	3%	7%	10%	77%
Vivino	2%	6%	12%	19%	61%
YouTube	2%	4%	6%	30%	58%

FB 37-38% for Millnl/GenX; Twitter 21/19%; Instagram 30% for Millennials!



Q. Please type in the first word (or brief 2-3 word phrase) that comes to mind when you think of the following wine regions. If nothing comes to mind for a region, just skip it. (*Dominant Top of Mind Associations by Wine Region*)

OREGON: Pinot Noir (general) 47%; Good/Excellent wine 9%;

WASHINGTON: Cabernet/good Cabernet 12%; Good/Excellent wines 11%; Good value/QPR (11%)

NAPA VALLEY: Cabernet Sauvignon 27%; Good/Great/Excellent wine 16%; Expensive (14%); Bold/Big/Rich wines (10%)

SONOMA COUNTY: Good/Great/Excellent wine 14%; Pinot Noir/Excellent Pinot Noir 11%; Value/Better value than Napa 11%

WILLAMETTE VALLEY: Pinot Noir (general) 44%; Good/Great Pinot Noir 18%;

SOUTHERN OREGON: Pinot Noir (general) 25%;

COLUMBIA GORGE: Cabernet/Good Cabernet 7%; Good/Excellent wines 7%;

WALLA WALLA VALLEY: Syrah/Excellent Syrah 15%; Cabernet/Excellent Cabernet 14%; Good/Excellent wines 12%



Top of Mind Associations by Oregon Wine Region - Details

<u>Oregon</u>	
Pinot Noir (general)	47%
Good/excellent wines	9%
Good/great Pinot Noir	6%
White wines/Pinot Gris/Riesling	5%
Up and coming	4%
<u>Southern Oregon</u>	
Pinot/Pinot Noir (general)	25%
Good/excellent wines	8%
Little known/underdeveloped	7%
White wines/Pinot Gris/Riesling	6%
Unfamiliar	5%
<u>Columbia Gorge</u>	
Cabernet Sauvignon/good/excellent Cabernet	7%
Good/excellent wines	7%
Good value/QPR	6%
Red (general)/good red wines	6%
White wines (general)/great whites	6%
<u>Willamette Valley</u>	
Pinot Noir (general)	44%
Good/great Pinot Noir	18%
Good/excellent wines	5%
White wines/Pinot Gris/Riesling	5%
Red wines/good reds (general)/Cabernet/Syrah/blends	5%



9. Please rate the following wine regions on a scale from 5 (one of the best) to 1 (poor) for the absolute quality of their wines and their value for the money. If you are unfamiliar with a region, please select "Undecided or don't know."

REGION	% TOO UNFAMILIAR TO RATE	ONE OF THE BEST (5)	EXCELLENT (4)	GOOD (3)	FAIR (2)	POOR (1)	MEAN RATING
Napa Valley	0%	52%	36%	10%	2%	0%	4.4
Sonoma County	1%	33%	46%	19%	2%	0%	4.1
Willamette Valley	16%	23%	48%	27%	3%	0%	3.9
Walla Walla Valley	32%	13%	41%	39%	5%	2%	3.6
Oregon	11%	6%	38%	50%	5%	1%	3.4
Washington	9%	6%	35%	53%	5%	1%	3.4
Southern Oregon	46%	4%	21%	60%	14%	1%	3.1
Columbia Gorge	49%	3%	19%	65%	13%	0%	3.1



9. Please rate the following wine regions on a scale from 5 (one of the best) to 1 (poor) for the absolute quality of their wines and their value for the money. If you are unfamiliar with a region, please select "Undecided or don't know."

REGION	% <i>TOO UNFAMILIAR TO RATE</i>	ONE OF THE BEST (5)	EXCELLENT (4)	GOOD (3)	FAIR (2)	POOR (1)	MEAN RATING
Washington	9%	8%	35%	53%	5%	0%	3.4
Walla Walla Valley	33%	7%	35%	48%	8%	3%	3.4
Sonoma County	1%	10%	29%	44%	16%	2%	3.3
Willamette Valley	15%	6%	30%	45%	18%	1%	3.2
Columbia Gorge	50%	5%	23%	65%	7%	0%	3.3
Oregon	11%	4%	25%	58%	13%	1%	3.2
Southern Oregon	47%	3%	25%	57%	14%	1%	3.1
Napa Valley	0%	9%	12%	30%	30%	19%	2.6



6. Please indicate approximately how often you drink wine made from the following grape varieties. Please include any consumption occasions at home, at the home of friends, in bars, restaurants, or other places where you might drink wine.

VARIETY (from any source or region)	WEEKLY	MONTHLY	SEVERAL TIMES A YEAR	LESS OFTEN	NEVER
Cabernet Sauvignon	48%	36%	11%	4%	1%
Red Blends	43%	37%	14%	5%	1%
Pinot Noir	34%	42%	16%	6%	2%
Chardonnay	21%	27%	25%	20%	8%
Syrah	19%	42%	25%	11%	3%
Tempranillo	10%	28%	33%	22%	8%
Riesling	6%	17%	30%	30%	18%
Pinot Gris	6%	16%	32%	30%	16%
Pinot Blanc	2%	10%	30%	38%	21%

10. Please indicate how familiar you are with the following wine varieties from Oregon.

VARIETY (FROM OREGON)	DRINK MONTHLY OR MORE OFTEN	DRINK OCCASIONALLY	HEARD OF & TRIED	HEARD OF, NOT TRIED	DID NOT KNOW OREGON MADE
Pinot Noir	40%	34%	14%	6%	6%
Pinot Gris	11%	21%	23%	19%	26%
Red Blends	7%	24%	33%	18%	17%
Cabernet Sauvignon	5%	19%	30%	22%	25%
Chardonnay	4%	22%	33%	21%	20%
Riesling	4%	14%	27%	24%	31%
Syrah	3%	15%	29%	23%	31%
Pinot Blanc	2%	15%	23%	26%	34%
Tempranillo	2%	5%	12%	20%	61%

Consumption of Wine by Variety from Any Source vs. Oregon

VARIETY	Percent Drinking Monthly or more often	
	From Any Source	From Oregon
Pinot Noir	78%	40%
Chardonnay	50%	4%
Riesling ← Millennials 27% occasional!	23%	4%
Pinot Gris	22%	11%
Pinot Blanc	12%	2%
Cabernet Sauvignon	84%	4%
Syrah	61%	3%
Tempranillo	38%	2%
Red Blends	81%	7%



11. Do you associate any of the following traits or statements with Oregon wines? Check any or all that apply.





13. Please check any of the factors listed below that you consider a reason why you might not purchase Oregon wines. Check any that apply and skip any factors that do not apply. (Base = do not purchase Oregon wines regularly)

I prefer wines from other regions	37% are Californian! →	44%
I know very little about the wines of Oregon		42%
I rarely or never see Oregon wines where I shop for wine		39%
Oregon doesn't make wines of the varieties that I like most		18%
Oregon wines are too expensive		10%
I have found the wines of Oregon to be of inconsistent quality		10%
I seldom see good reviews or high critics scores on wines from Oregon		9%
Oregon wines are not a good value for the money		9%
I don't like the taste of wines I have tried from Oregon		5%
People whose wine knowledge I trust do not recommend Oregon wines		4%



17. Have you visited the wine producing areas of the following regions, and if so how often?

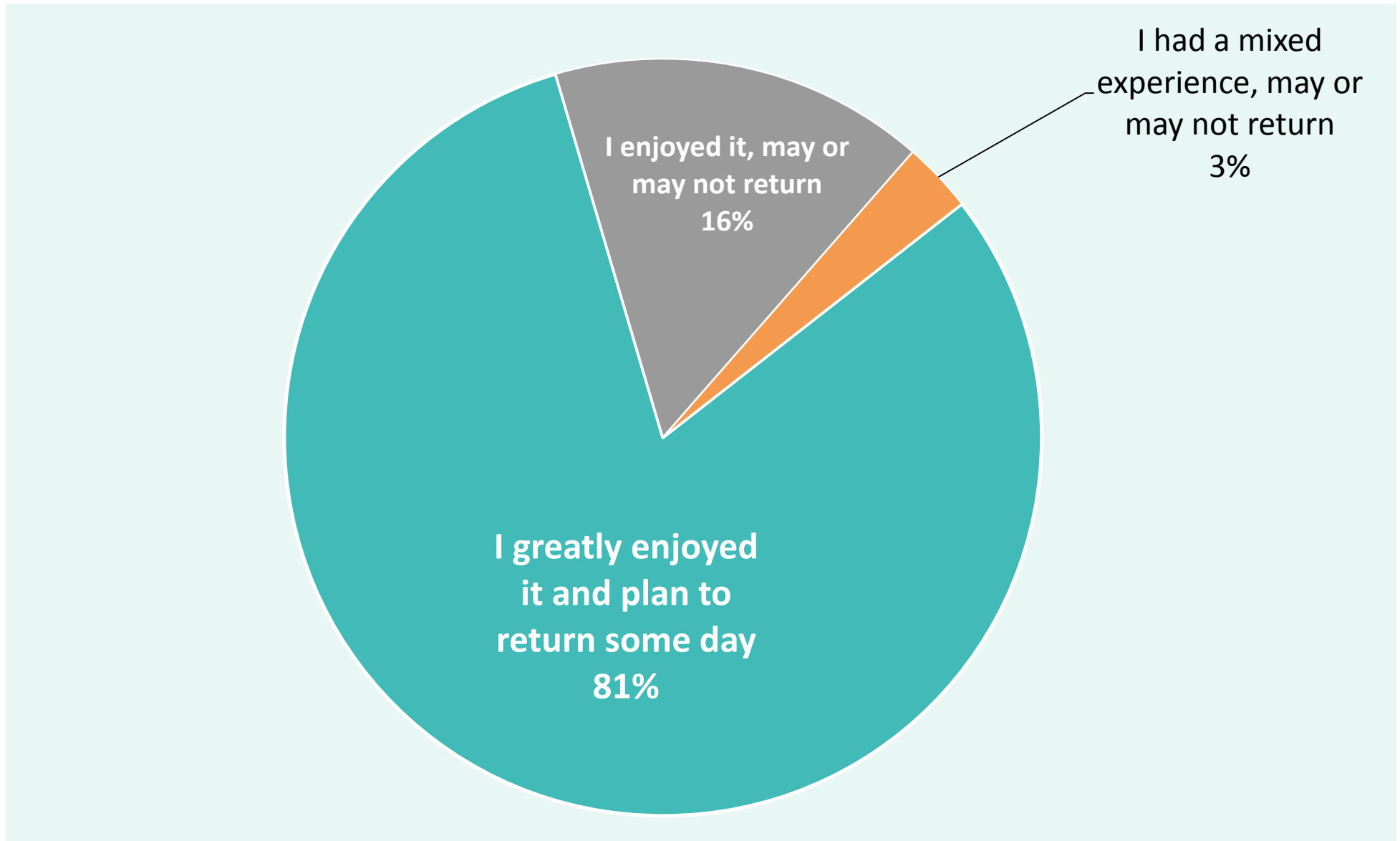
REGION	Visited 2+ times in past two years	Visited Once in past two years	Visited over two years ago	Have NOT visited
Napa Valley	28%	22%	33%	17%
Sonoma County	28%	21%	31%	19%
Washington (other than Walla Walla)	9%	9%	18%	64%
Willamette Valley	6%	12%	20%	62%
Walla Walla Valley	6%	5%	11%	77%
Columbia Gorge	5%	6%	13%	76%
Southern Oregon	4%	8%	13%	75%

Factors Influencing Oregon Wine Country Visitation (Base = visited Oregon wine country)

Had previously tried Oregon wine and wanted to visit the wineries	60%
Wanted to discover new wines	58%
Friend/family recommendation	40%
Read about it in a wine or food magazine/book/website	39%
Read about it in a travel magazine/book/website	31%
Attending a wine focused festival or event	26%
Wanted to purchase wines not available in my area	19%
Travel tools and information provided by a winery or wine association	19%



Oregon Wine Country Visit Assessment





21. Which of the following traits or features of Oregon Wine Country did you enjoy the most? (Please select up to three.) (Base = visited Oregon wine country, plan to return)

REASON	% OF RESPONDENTS
Quality of the wines	83%
Discovering new wines and wineries	73%
Friendliness and hospitality of the people and wineries	69%
Scenic and natural beauty	64%
Good food and restaurants	43%
Ease of travel within wine region	34%
Ease of travel to Oregon wine country	33%
Prices of wine and/or tasting fees	28%
Accommodations, lodging or hotels	19%
Other (non-wine) attractions in wine country	8%



22. Which of the following traits or features of Oregon Wine Country make you unsure whether you will return? (Please select up to three.)

REASON	# OF RESPONDENTS
More interested in visiting other states or regions	11
Difficulty of travel to Oregon wine country	9
Not enough other interesting things to do in the area	8
High prices of wine and/or tasting fees	7
Quality of the wines	6
Lack of or poor accommodations and hotels	4
Poor or uninteresting places to eat	3
Reception and hospitality issues	2
Difficulty of travel within Oregon wine country	2



“ **Wine Opinions** ”

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QUESTIONS?