



“ Wine Opinions ”

# Oregon Wine Board Consumer Study

December 18, 2015

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# INTRODUCTION

Wine Opinions is a wine market research company focusing on the attitudes, behaviors, and taste preferences of the segment of U.S. wine drinkers who are the most frequent purchasers and consumers of wine. To this end, Wine Opinions maintains the largest online panel of highly involved wine consumers ever assembled, and a U.S. wine trade panel that includes wine producers, growers, importers, distributors, those who work on-premise and off-premise, members of the wine media, and others. Wine Opinions also undertakes custom research projects such as one-on-one interviews, on-site interviews and evaluations, and other such qualitative and quantitative research as suits client project objectives. In addition, Wine Opinions uses a hybrid form of online discussion group called

Vintrospectives to cull specific respondents of interest to clients from the Wine Opinions consumer and trade panels. This methodology allows participants to comment on discussion topics and interact both with one another and with the Wine Opinions discussion moderator.

The Oregon Wine Board would like to update its understanding of Oregon wine consumption and interest in Oregon wines among high-frequency wine drinkers who are also high-end wine purchasers. This report details the results of a quantitative consumer survey of the Wine Opinions consumer panel. The survey covered the range of awareness, trial, usage, competitive frame, and other relevant issues.

# OBJECTIVES & METHODOLOGY

The primary goal of this research was to investigate wine consumers who currently drink or have interest in potentially drinking Oregon wine. Additionally, the purpose of this survey was to gain insights into the interaction of Oregon with its key competitor regions, what kind of attributes or information sources influence buying Oregon wines, and the differences between current consumers and potential consumers of Oregon wine. The specific goals of the survey were to:

- ✓ Measure frequency of consumption by varietal.
- ✓ Establish familiarity with and perceptions of wines from Oregon and competing regions. Profile regular consumers of Oregon wines and highlight any differences with high frequency, high end 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 access frequency.
- ✓ Measure and assess Oregon wine country visitation.

Only 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 are included in the analysis on which this report is based. These high-frequency, high-end wine consumers are referred to as HFHE wine drinkers throughout this report.

Survey respondents were drawn from the Wine Opinions consumer panel. All respondents were sent an email invitation to the survey, with a link to the online survey embedded in the invitation (a copy of the survey questionnaire may be found at the end of this report). Completion of the survey entered all participants into a lottery for various cash rewards.

In total, 1,106 Wine Opinions consumer panelists participated in this survey, 475 of which were HFHE wine drinkers.

## 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.

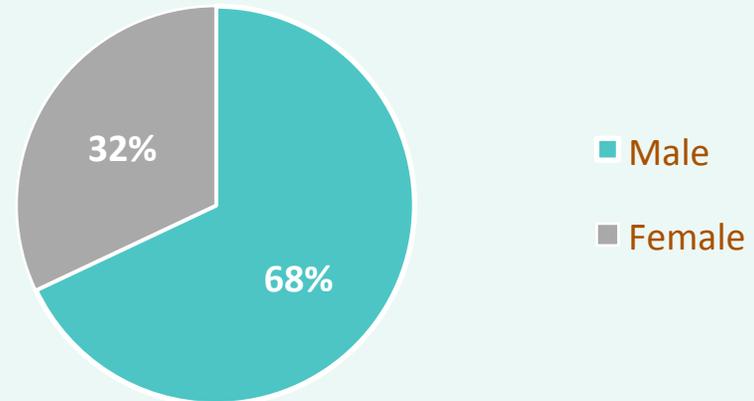
Where statistically significant results are reported, these have been calculated at a confidence level of at least 90%. For the overall sample, the confidence intervals ranged from approximately  $\pm 2.3\%$  -  $\pm 3.8\%$ .

# CONSUMER RESPONDENT PROFILE

## Gender

Respondents in total were 68% male and 32% female, a male skew due to the respondent pool being comprised of high-frequency wine drinkers (more often than once a week) who are also high-end wine buyers (buy wine that costs \$20 or more at least monthly), which is a consumer segment that skews heavily male.

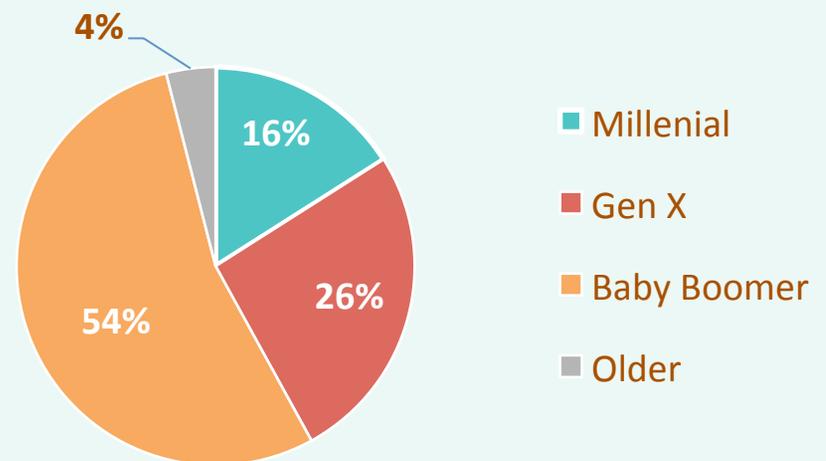
Consumer Respondents by Gender



## Generation

The largest generational segment of respondents was the Baby Boomer segment (54%). Millennials made up 16% of the respondent pool and one-quarter were of Generation X (26%). Some 4% represented consumers aged 70 and older. The average respondent age was 52.

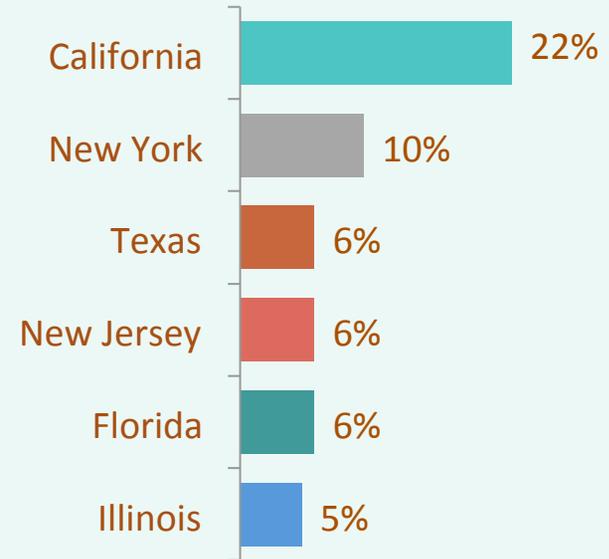
Consumer Respondents by Generation



## Geography

Respondents who participated in this study reside in 44 U.S. states, including the District of Columbia. The most highly represented states were California (22%); followed by New York (10%); Texas, New Jersey, and Florida (6% each), and Illinois (5%). Some 4% of respondents live in Washington state and 2% live in Oregon.

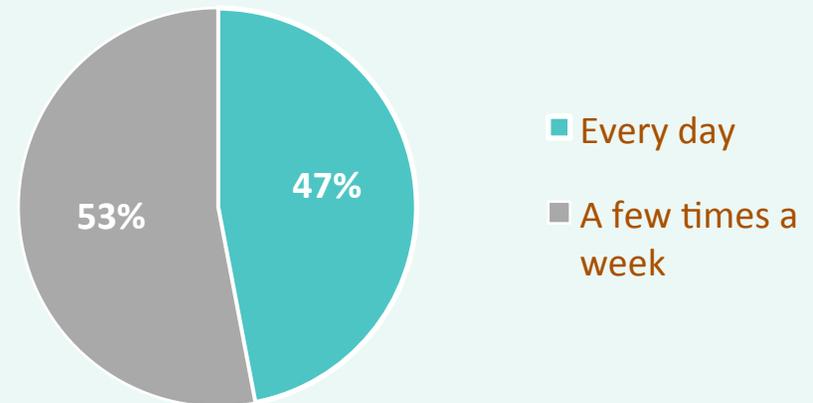
### Top States Represented



# WINE CONSUMPTION AND PURCHASE BEHAVIOR

To participate in the survey, respondents were required to drink wine either daily or a few times a week. Wine consumers who drink wine at this rate of frequency are defined as “high-frequency” wine drinkers. This high-frequency wine drinker segment was made up of the 47% of survey respondent consumers who are daily wine drinkers and the 53% who drink wine several times a week.

**Consumer Respondents by Consumption Frequency**



## Wine Consumption and Purchase Behavior (continued)

All consumer respondents who were included in the analysis for this report buy wine that costs more than \$20 at least monthly. This purchase frequency in the \$20 and over price category, along with drinking wine more often than once a week, defines the high-frequency/high-end (HFHE) respondent pool on which this report is based.

Despite the frequency in which they buy high-end wine, half of these HFHE respondents buy wine priced under \$10 at least monthly (49%), and half buy wine priced between \$10 and \$19.99 on a weekly basis (50%).

The majority buy wine in the \$20 - \$29.99 price category monthly (76%) and an addition 19% buy wine in this price range weekly. Wine that costs \$30 - \$49.99 is purchased monthly (34%) or several times a year (50%) by the majority of respondents, and in the \$50 and over price category, several times a year (42%) or less often than several times a year (34%) by the majority of these HFHE wine drinkers.

	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%

## Wine Consumption and Purchase Behavior (continued)

A series of factors considered when purchasing wine in the \$20 or more price category were rated on a 5-point importance scale ("5" = highly important and "1" = not important at all).

Looking at purchase decisions for wines in this price category, familiarity is most important – either familiarity with the region (77% rated it a "5" or "4"), or with the wine brand or producer (76%). A recommendation from either a friend (68%) or from store or restaurant staff (61%) is the second most important purchase decision factor.

Having visited the region was rated of the highest importance ("5") by 29% of HFHE respondents, a slightly higher rate than recommendations from friends or professional staff. However, one-fourth of respondents rated visitation just "1" or "2." When all ratings are averaged, visitation is slightly less important than recommendations overall (mean rating of 3.5 vs. 3.6 for store/restaurant staff recommendations and 3.7 for a recommendation from a friend).

### \$20+ Wines: Most Important Purchase Decision Factors

	HIGHLY IMPORTANT (5)	(4)	(3)	(2)	NOT IMPORTANT AT ALL (1)	MEAN
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

## Wine Consumption and Purchase Behavior (continued)

High scores from a leading magazine or critic and having read about a wine in an article or blog post are less important to deciding whether or not to purchase a wine in the \$20+ price category. The majority of respondents rated these two factors either a "4" or "3" (66% and 68% respectively).

The least important purchase decision factors for wines in this price range among HFHE wine consumers are being priced slightly lower than other wines considered and being made from organic or sustainably farmed grapes. The majority rated the pricing scenario either a "2," "3," or "4" (79%), and the majority rated the organic/sustainably farmed factor either a "2," or "3" (62%).

More important to HFHE women when purchasing \$20+ wines are recommendations from professional staff (mean rating of 3.9 vs. 3.5 among men) and family and friends (3.9 vs. 3.7). Although still the least important trait, organic/sustainable farming methods are more important to women (2.8 vs. 2.5).

Baby Boomers consider a visit to the region more important than other generations (3.6 vs. 3.2 – 3.3) and familiarity with a region's wines (4.1 vs. 3.9),

while Millennials see a slightly lower price than another wine being considered more important than do other generations (3.2 vs. 2.7), and are the least concerned about being familiar with the brand or producer (3.7 vs. 4.0 – 4.1).

Neither regular Oregon wine buyers nor frequent Pinot Noir buyers differed significantly from other respondents when rating purchase decision factors.

### \$20+ Wines: Less Important Purchase Decision Factors

	HIGHLY IMPORTANT (5)	(4)	(3)	(2)	NOT IMPORTANT AT ALL (1)	MEAN
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

## Wine Consumption and Purchase Behavior (continued)

Cabernet Sauvignon and red blends are the types of wine purchased most often by HFHE wine consumers. Nearly half buy these wines weekly (48% and 43% respectively), and over one-third buy them monthly (36% and 37%). Pinot Noir is the next most often purchased wine (34% weekly and 42% monthly), followed by Syrah (19% weekly and 42% monthly). Chardonnay is purchased at least monthly by just under half of the respondents (48%). It should be noted that “red blends” are commonly thought of by HFHE consumers as including wines like Bordeaux or blends of Cabernet-related grapes, Rhone wines, etc.

The majority of respondents buy Tempranillo (55%), Riesling (60%), Pinot Gris (62%), and Pinot Blanc (68%) several times a year or less often. Approximately one-fifth never buy Riesling (18%), Pinot Gris (16%), and Pinot Blanc (21%).

Weekly/monthly Pinot Noir wine drinkers tend to buy wines in the \$30 - \$49.99 price range (44% vs. 25%) and \$50+ price category (20% vs. 10%) either weekly or monthly at higher rates than other respondents. They are also significantly more likely to buy all the white varieties listed monthly or more

often, as well as Syrah; but not Cabernet Sauvignon, Tempranillo or red blends. Regular Oregon buyers purchase all the listed varieties more often than the average, especially Pinot Noir, Syrah and Riesling.

**Frequency of Wine Consumption by Wine Type**

	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%

## Wine Consumption and Purchase Behavior (continued)

The purchase and consumption of Napa Valley and Sonoma County wine is ubiquitous among HFHE wine consumers. Nearly all buy or drink wine from these regions regularly (68% and 66% respectively) or have tried them a number of times (28%).

A second tier in terms of familiarity included Oregon, the Willamette Valley, and Washington. One-third reported they buy or drink wine from these three regions regularly (32% - 33%) and nearly half have tried wines from these regions a number of times (42% - 48%).

Walla Walla Valley, Southern Oregon, and Columbia Gorge comprised a third tier. Over one-third have tried wines from these regions a number of times (34% - 39%), but significantly fewer are regular consumers. Of the three, Walla Walla Valley is the most familiar (17% buy/drink it regularly), while rates of regular consumption/purchases of wines from Southern Oregon and Columbia Gorge were at parity (9%).

Total Oregon wine trial was highest among male HFHE wine drinkers (97% vs. 90%) and lowest among Gen Xers (88% vs. 96% or others).

Wine Region Familiarity					
	BUY/DRINK REGULARLY	TRIED A NUMBER OF TIMES	TRIED ONCE OR TWICE	HEARD OF NOT TRIED	HAVE NOT TRIED
Napa Valley	68%	28%	3%	0%	1%
Sonoma County	66%	28%	4%	2%	1%
Oregon	33%	47%	14%	4%	2%
Willamette Valley	33%	42%	14%	4%	8%
Washington	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%

## **Wine Consumption and Purchase Behavior (continued)**

Monthly-plus drinkers of Pinot Noir were significantly more likely to have tried wines from Oregon (84% vs. 65%), Willamette Valley (77% vs. 65%) and Southern Oregon (51% vs. 35%). They were also far more likely to drink Oregon regularly (40% vs. 12%). Regular buyers of Oregon wines were also more likely to have tried Willamette Valley and Southern Oregon wines, as well as Columbia Gorge, Washington and Walla Walla wines.

California residents were significantly less likely to consume Oregon wines regularly (17% vs. 56% for Northwest residents and 36% for all other states).

## Wine Consumption and Purchase Behavior (continued)

HFHE survey participants were asked what words or phrases come to mind when they think of wines from Oregon and competing regions.

Oregon is overwhelmingly known for its Pinot Noir (47%), and has a bit of a reputation for "good" or "excellent" wines (9%). Oregon's association with Pinot Noir greatly overshadows Sonoma County's, which 11% associate with Pinot Noir. Sonoma County is known at the same rate for being a better value than Napa Valley (11%), and by a slightly higher rate, for producing "good" or "excellent" wines (14%).

Washington is best known for its Cabernet Sauvignon (12%), for producing "good" or "excellent" wines (11%), and for providing good value (11%). However, Washington Cabernet Sauvignon is overshadowed by that produced in Napa Valley, which was associated with Cabernet Sauvignon by more than twice the number of respondents (27%). Some 16% associate Napa Valley with "good" or "excellent" wines, and 14% with being expensive.

### Top of Mind Associations by Wine Region

<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>Washington</u>	
Cabernet Sauvignon/good/excellent Cabernet	12%
Good/excellent wines	11%
Good value/QPR	11%
Red (general)/good red wines	9%
Syrah/excellent Syrah	8%
Pinot Noir/good Pinot Noir	7%
Up and coming/growing	6%
Cool/cold/crisp climate	5%
Big/bold wines/full bodied	5%
<u>Napa Valley</u>	
Cabernet Sauvignon	27%
Good/great/excellent wines (general)	16%
Expensive	14%
Bold/big wines/rich	10%
Overpriced	9%
Quality/high quality	5%
<u>Sonoma County</u>	
Good/great/excellent wines (general)	14%
Pinot Noir/excellent Pinot Noir	11%
Value/Better value than Napa/undervalued	11%
Variety/many varieties/great selection	7%
Chardonnay	7%
Quality/high quality	6%
Red wines (general)/great red wines	6%

## Wine Consumption and Purchase Behavior (continued)

Looking at Oregon wine regions, Willamette Valley is best known for its Pinot Noir (44%), as is Southern Oregon, but to a lesser degree (25%). For both regions white wines were only mentioned by 5% - 6% of respondents, and 5% mentioned red blends and other red wines besides Pinot Noir in association with Willamette Valley (5%).

Columbia Gorge was most often associated with Cabernet Sauvignon (7%), with red and white wines in general (6%), and with Pinot Noir (5%). Just as many who associated Columbia Gorge with "good"/"excellent" wines (7%) and "good value"/"QPR" (6%), consider wines from this region "ok" or "hit or miss" (6%).

Walla Walla Valley is best known for its Syrah (15%) and Cabernet Sauvignon (14%), and for producing "good" or "excellent" wine (12%).

Regular Oregon wine buyers were significantly more likely to associate Willamette Valley with Pinot Noir in general and "good" or "great" Pinot Noir in particular (22% vs. 13% for occasional or non-buyers). Regular Pinot Noir buyers were also almost twice as likely to cite "good" or "great" Pinot Noir for Willamette Valley (20% vs. 11%).

### Top of Mind Associations by Wine Region

<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%
<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%
Ok/hit or miss	6%
Unknown/little known area	6%
Pinot Noir/Good Pinot Noir	5%
<u>Walla Walla Valley</u>	
Syrah/excellent Syrah	15%
Cabernet Sauvignon/good/excellent Cabernet	14%
Good/excellent wines	12%
Red (general)/good red wines	9%
Good value/QPR	6%
Red blends/good red blends	6%
Up and coming/growing	5%
Merlot/good Merlot	5%
Big/bold wines/full bodied	5%

## Wine Consumption and Purchase Behavior (continued)

Wine from Napa Valley is rated "one of the best" in quality by a over half of the HFHE respondents (52%), compared to one-third who rated Sonoma County (33%) and one-quarter who rated the Willamette Valley (23%) this high on quality. The largest contingent of respondents rated the quality of the wines from Sonoma County and the Willamette Valley "excellent" (46% and 48% respectively). Most quality ratings for Walla Walla Valley, which was fourth in overall quality assessments, were split between "excellent" (41%) and "good" (39%).

Oregon and Washington were rated similarly on quality, with 50% rating Oregon and 53% rating Washington "good" and approximately one-third rating them "excellent" (38% and 35% respectively).

The majority rated Southern Oregon (60%) and Columbia gorge (65%) "good."

Mean ratings tracked consistently with "one of the best" ratings. Only a tiny proportion of respondents rated any region "poor," and even "fair" ratings were below 10% for all regions except Southern Oregon (14%) and Columbia Gorge (13%).

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

## Wine Consumption and Purchase Behavior (continued)

HFHE women were almost twice as likely to be undecided when rating Oregon wine on quality (15% vs. 8%).

Pinot Noir drinkers rated Oregon wine higher on quality (3.5 vs. 3.3), as did Oregon wine buyers - not surprisingly (3.6 vs. 3.2). There was no statistically significant difference in average Oregon quality ratings between those who had visited Oregon wine country and those who hadn't.

Residents of the rest of the U.S. rated Oregon quality significantly higher than Californians (3.5 mean vs. 3.2) and in fact slightly higher than Northwest residents (3.4). Northwest residents rated Willamette Valley higher (4.1) than Californians (3.7) and the rest of the U.S. (4.0). Northwest residents and the rest of the U.S. rated Columbia Gorge higher than Californians (3.2 vs. 2.9). Quality ratings for Southern Oregon did not differ by region of residence.

## Wine Consumption and Purchase Behavior (continued)

Mean value ratings were more tightly grouped than the mean quality ratings, with the largest contingent of respondents rating nearly all regions "good." The exception was lowest-rated Napa Valley, which was rated by the majority either "good" (30%) or "fair" (30%).

Washington and Walla Walla Valley were rated highest on value. Approximately half rated them "good" (53% and 48% respectively) and over one-third rated them "excellent" (35%).

Sonoma County and the Willamette Valley, with Sonoma County having a slight lead, formed a second tier. Columbia Gorge, Oregon, and Southern Oregon, were not far behind with a majority rating them "good" values.

Oregon wine buyers rated Oregon wine higher on value than non-Oregon wine buyers (3.4 vs. 2.9). Northwest residents and the rest of the U.S. rated Oregon value higher than Californians (3.3 and 3.2 vs. 3.0). The same pattern repeated for Southern Oregon, Columbia Gorge and Walla Walla, although not always with statistical significance.

**Wine Value Ratings by Wine Region**

	ONE OF THE BEST (5)	EXCELLENT (4)	GOOD (3)	FAIR (2)	POOR (1)	MEAN
Washington	8%	35%	53%	5%	0%	3.4
Walla Walla Valley	7%	35%	48%	8%	3%	3.4
Sonoma County	10%	29%	44%	16%	2%	3.3
Willamette Valley	6%	30%	45%	18%	1%	3.2
Columbia Gorge	5%	23%	65%	7%	0%	3.3
Oregon	4%	25%	58%	13%	1%	3.2
Southern Oregon	3%	25%	57%	14%	1%	3.1
Napa Valley	9%	12%	30%	30%	19%	2.6

# OREGON WINE

HFHE respondents were asked specifically how familiar they were with varietals from Oregon. Pinot Noir is the only variety a majority reportedly drink at least occasionally (74%). There was a large drop to the next most familiar – Pinot Gris – which one-third drink at least occasionally (32%). The remaining respondents were fairly evenly split between having heard of Oregon Pinot Gris and having tried it (23%) or having heard of it and not having tried it (19%). One-quarter were not aware that Pinot Gris was grown in Oregon (26%).

Respondents were slightly more familiar with Oregon red blends than with Oregon Cabernet Sauvignon and Chardonnay. Although approximately one-third had heard of and tried all three of these Oregon wines, three in ten drink red blends from Oregon at least occasionally (31%) compared to one-quarter who drink Cabernet Sauvignon and Chardonnay from Oregon at this rate of frequency (24% and 26% respectively).

Oregon Riesling, Syrah, and Pinot Blanc are consumed by 17% - 18% at least occasionally and 31% - 34% did not know these varieties were grown in Oregon. Some 61% were unaware Tempranillo was produced in Oregon.

Familiarity with Oregon Varietals					
	DRINK MONTHLY OR MORE OFTEN	DRINK OCCASIONALLY	HEARD OF/TRIED	HEARD OF/NOT TRIED	DIDN'T KNOW GROWN IN OREGON
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%

## Oregon Wine (continued)

Male HFHE wine consumers are more apt than women to drink Oregon Pinot Noir at least occasionally (80% vs. 61%), as well as Chardonnay (31% vs. 15%), Riesling (20% vs. 13%), and Pinot Gris (37% vs. 22%) at least occasionally.

Consumption of Oregon Riesling is highest among Millennials, as over one-quarter say they drink it at least occasionally (27%), compared to 16% - 17% of other generations.

Not surprisingly, respondents who drink Pinot Noir either weekly or monthly are more likely than respondents who drink Pinot Noir less often or not at all to drink Oregon Pinot Noir at least occasionally (82% vs. 46%). However, they are also more likely to at least occasionally drink Oregon Chardonnay (30% vs. 12%) and Oregon Pinot Gris (36% vs. 19%).

Those who say they drink Oregon wine regularly nearly all drink Oregon Pinot Noir at least occasionally, and 67% of them drink it monthly or more often. They are significantly more likely to drink every variety listed from Oregon, in particular Pinot Gris.

It is interesting to note that half of those who drink

Pinot Noir and Pinot Gris weekly or monthly drink Oregon Pinot Noir and Pinot Gris at least monthly (50% and 52% respectively). Some 17% of Riesling and Pinot Blanc drinkers choose to drink these varietals from Oregon. Less than one in ten respondents who drink all other varietal and wine types at least monthly (i.e., Chardonnay, Cabernet Sauvignon, red Blends, Syrah, and Tempranillo), choose to drink these varietals/wines from Oregon at least monthly.

### Consumption of Wine by Variety from Any Source vs. Oregon

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

## Oregon Wine (continued)

Respondents were given a list of attributes and asked whether they associated them with Oregon wines.

Oregon wines are most often associated by HFHE wine consumers with many small artisan producers or family wineries (79%), followed by being food friendly (59%).

Just over half associate Oregon wines with being a good value for the money (53%) and being sustainably farmed or produced (51%).

A significant minority believe they are highly regarded by wine critics or are consistently of high quality (46% and 45% respectively).

Only 40% reported that Oregon wines are “readily available at shops or restaurants” near them, and just one-third are aware that Oregon produces a wide variety and styles of wine (35%).

### Attributes Associated with Oregon Wines



## Oregon Wine (continued)

Male HFHE respondents more often than female respondents associated Oregon wine with small artisan or family producers (82% vs. 74%), highly regarded by critics (51% vs. 34%), and consistently high-quality (49% vs. 38%). Those who drink Pinot Noir monthly or more often also more strongly associated these traits with Oregon, at roughly similar rates.

Regular buyers of Oregon wine associated Oregon wine with all of the traits at significantly higher rates than others, in particular “food-friendly” (73% vs. 42% for occasional or non-buyers), “highly regarded by wine critics” (61% vs. 27%), and “consistently high quality” (65% vs. 22%). Oregon visitors associated all traits but good value with Oregon wine at higher rates than those who had not visited Oregon wine country.

## Oregon Wine (continued)

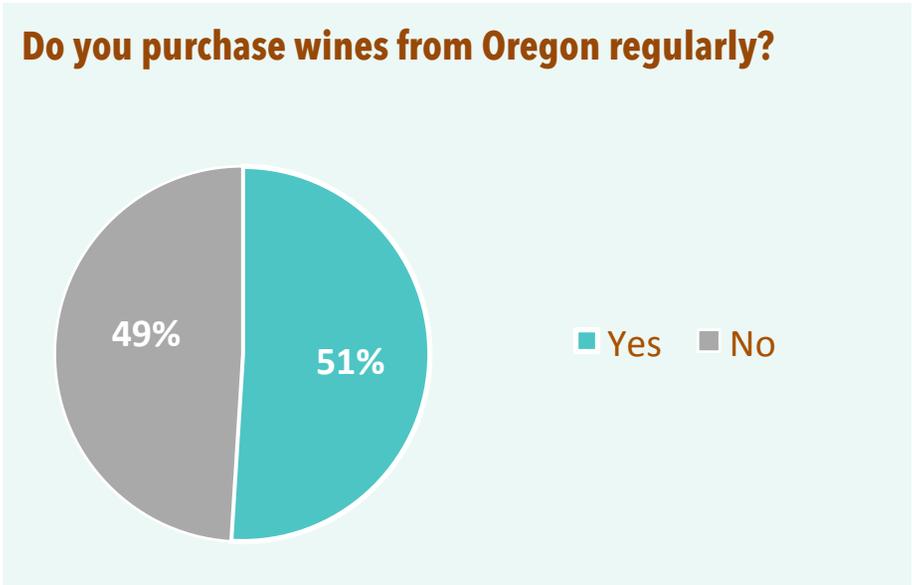
Half of the HFHE survey respondents reported they purchase Oregon wine regularly (51%).

Regular Oregon wine buyers do not differ from others by age, but do by gender – they skew heavily male (76% male/24% female vs. non-regular Oregon wine buyers which are 60% male/40% female).

Oregon wine buyers purchase wine in the \$30 - \$49.99 price range (48% weekly/monthly vs. 30%) and \$50+ price category (24% vs. 12%) more frequently than non-regular wine buyers.

Californians are less likely than respondents in other parts of the country to buy Oregon wine (35% vs. 55% respondents from other states). Respondents from Oregon and Washington were most likely to buy Oregon wine (75%); however, this was a fairly small sample (n = 27).

Those who have visited Oregon wine country were almost twice as likely as those who haven't visited Oregon to regularly buy Oregon wine (73% vs. 39%). Weekly/Monthly Pinot Noir buyers were also more likely to be regular Oregon wine buyers (57% vs. 32% of those who buy Pinot Noir less often or not at all).



## Oregon Wine (continued)

The 49% of HFHE respondents who reported they do not purchase Oregon wine regularly were asked to check any of a list of reasons why they don't purchase Oregon wines, as well as an option to write in a reason. The average respondent gave two reasons. The top answers included a preference for wines from other regions (44%), little knowledge about Oregon wines (42%), and rarely or never seeing Oregon wines where they shop (39%).

Only 18% don't buy Oregon wine because Oregon doesn't produce wine varieties they like. Some 10% or fewer respondents cited expense, a lack of good reviews, the perception that Oregon wines are inconsistent or not good value, lack of recommendations, or not liking the Oregon wines they have tried as reasons for not buying Oregon wine.

It should be noted that men were more than three times as likely than women not to buy Oregon wine because it is too expensive (14% vs. 4%) and because they don't see it as a good value (13% vs. 1%), albeit at low levels.

### Reasons Might Not Purchase Oregon Wines (Base = do not purchase Oregon wines regularly)

I prefer wines from other regions	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%

## Oregon Wine (continued)

Baby Boomers were the generation that most often cited not making wines in the varieties they like as a reason they don't buy Oregon wines (27% vs. 8% - 10% of other generations).

Californians were more likely to state a preference for other wine regions (presumably Californian) and lack of visibility as reasons they don't buy Oregon.

An additional 16% of respondents who do not buy Oregon wines regularly gave “Other” reasons via a text box. Of these, the three leading reasons were preferring other regions or types of wine (35% of “other”); lack of visibility or distribution (19%); and lack of awareness or thinking about the wines (13%).

# MEDIA

Media usage among HFHE respondents was measured. The media source read most often is *Wine Spectator*, with over half reading it at least monthly (54%). Among other print publications, *Wine Enthusiast* (48% at least monthly) and *Food & Wine* (45%) made up a second tier, while *The Wine Advocate* (28%) and *Wine & Spirits* (22%) trailed. Among the print publications, *Wine & Spirits* or a wine column in a local newspaper had the highest "rarely or never" read rates (43% and 48% respectively).

Bearing in mind that the largest proportion of HFHE respondents rarely or never access wine-related online media, information, and retail sites, wine blogs are most often viewed (41% at least monthly), followed by Wine-Searcher.com (27%), and Wine.com (24%). The majority rarely or never visit WineFolly.com (72%) or Snooth (60%).

*Wine Spectator*, *The Wine Advocate*, Wine-Searcher.com, and blogs are utilized more often by regular Oregon wine buyers and Oregon visitors, possibly due to the male skew in Oregon wine purchases and visitation and the fact that men read/visit these media sources more often than women.

In terms of age differences, Baby Boomers are more likely to read *Wine Spectator* or *Wine Enthusiast*, while Millennials are more likely to read *Wine & Spirits* and visit Wine-Searcher.com.

## Publication/Website Visitation Frequency

	WEEKLY OR MORE OFTEN	1-3 TIMES A MONTH	OCCASIONALLY	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%

## Media (continued)

Most HFHE respondents do not visit, post, or exchange information or images about wine on social media sites. Facebook is the only social media site used by a majority of respondents for wine-related interactions. Three in ten respondents use it for this purpose weekly or more often, half use it monthly or less often (50%), and two in ten do not use Facebook at all (20%).

After Facebook, Twitter is used next most often by respondents for wine-related communications (48%), followed by Instagram and YouTube (41% and 42% respectively), then Vivino and Pinterest (39% and 35%). Delectable is used by the fewest respondents (23%).

Among those who do use social media for wine-related purposes, Millennials and Gen Xers were significantly more likely to use every form except Vivino.

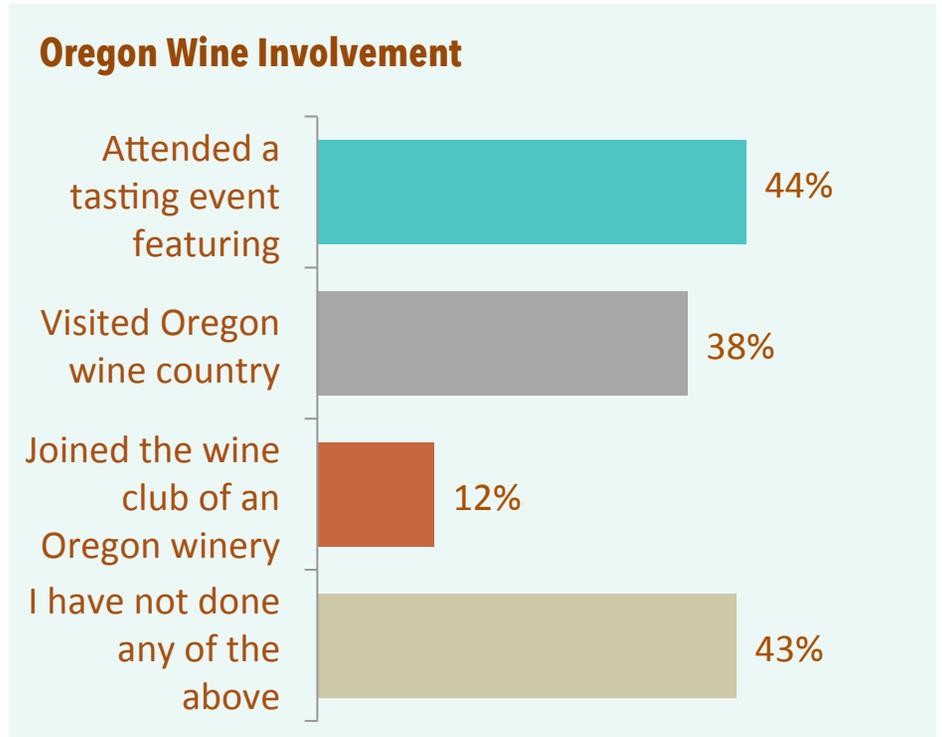
Wine-Related Social Media Usage					
	DAILY	SEVERAL TIMES A WEEK	1-4 TIMES A MONTH	LESS OFTEN	DON'T USE THIS SOCIAL MEDIA
Facebook	13%	18%	23%	27%	20%
Twitter	6%	8%	9%	25%	52%
Instagram	5%	7%	12%	17%	59%
Pinterest	4%	4%	7%	20%	65%
Delectable	2%	3%	7%	10%	77%
Vivino	2%	6%	12%	19%	61%
YouTube	2%	4%	6%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

# OREGON VISITATION

A total of 38% of HFHE wine consumers respondents have visited Oregon wine country. Moreover, 44% have attended a tasting that featured Oregon wines, and 12% have joined an Oregon winery wine club.

Those who have visited Oregon wine country skew slightly older compared to those who have not visited (54 vs. 51). Men are more likely to have visited Oregon wine country and to have joined an Oregon winery wine club than females (42% vs. 28% and 16% vs. 5% respectively). Millennials are the least likely to have visited Oregon wine country (21% vs. 39% – 40% of other generations).

Compared to other respondents, Oregon wine country visitors are more often weekly/monthly purchasers of wines in the \$30 - \$49.99 price range (50% vs. 34%) and \$50+ price category (30% vs. 11%). This may be driven by a greater visitation rate among Pinot Noir drinkers. Weekly/Monthly Pinot Noir drinkers have had more exposure to Oregon wines through visitation (42% vs. 22%), a tasting (47% vs. 32%), or a wine club (14% vs. 7%) than respondents who drink Pinot Noir less often or not at all.



## Oregon Visitation (continued)

Oregon and Washington have not had the exposure that Napa Valley and Sonoma County have had through visitation. The great majority of respondents have visited Napa Valley and Sonoma County (83% and 81% respectively), and half have done so in the past two years (50% and 49%). In fact 28% visited these two regions two or more times in the past two years.

The most often visited regions in Oregon and Washington are the Willamette Valley (38% have visited, 18% in the past 2 years) and Washington wine regions outside the Walla Walla Valley (36% have visited, and 18% in the past 2 years).

Approximately one-quarter of HFHE wine drinker survey participants have visited Southern Oregon (25%), Columbia Gorge (24%), or Walla Walla Valley (23%), but only 11% - 12% in the past two years.

Men were more likely to have visited all of these regions, and more likely to have visited the Willamette Valley (8% vs. 2%), Columbia Gorge (7% vs. 2%), and Walla Walla Valley (8% vs. 3%) in the past 2 years. Millennials were the least likely to visit all but Southern Oregon and Walla Walla Valley.

Pinot Noir drinkers were more apt to have visited the Willamette Valley (42% vs. 24%), as well as Napa Valley and Sonoma County. Californians are significantly more likely to have visited all the Northwest regions, no doubt due to their proximity.

### Wine Region Visitation Frequency by Region

	VISITED 2+ TIMES IN PAST 2 YEARS	VISITED ONCE IN PAST 2 YEARS	VISITED OVER 2 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%

## Oregon Visitation (continued)

Of those HFHE wine consumers who have visited Oregon wine country, the top factors that influenced their visit was having tried Oregon wine and wanting to visit the wineries (60%), and an interest in discovering new wines (58%). Recommendations from family and friends (40%), and reading about Oregon in a wine or food publication or website (38%) or travel publication or website (31%) are less influential than previous trial.

Least influential in spurring visitation is attending a tasting event (26%), a lack of local availability (19%), or any information provided by an Oregon winery or wine association (19%).

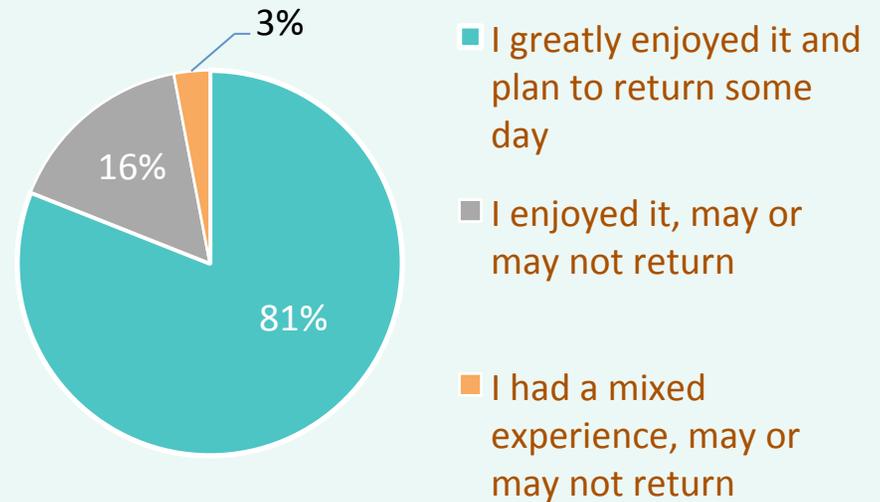
### Factors Influencing Oregon Wine Country Visitation (Base = visited Oregon wine country)

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 Visitation (continued)

Again, among those HFHE wine consumers who have visited Oregon wine country, most "greatly" enjoyed it and plan to return to Oregon (81%). An additional 16% enjoyed it, but are unsure whether or not they will return. Only 3% had a mixed experience and are unsure if they will return. Although respondents were given the option to report they did not enjoy their visit, no respondent chose that answer.

### Oregon Wine Country Visit Assessment



## Oregon Visitation (continued)

HFHE survey participants who visited Oregon and enjoyed their time there were asked what they enjoyed most about their visit. They were given a list of traits and asked to select up to three.

Respondents most often enjoyed the quality of the wines (83%) and discovering new wines and wineries (73%).

Approximately two-thirds enjoyed the friendliness and hospitality of the people and wineries they visited (69%) and Oregon's scenic and natural beauty (64%).

The food, travel, prices, accommodation, and non-wine attractions were trip highlights for less than half of the Oregon visitors.

### Most Enjoyable Oregon Wine Country Features

(Base = visited Oregon wine country)

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%

## Oregon Visitation (continued)

There were very few respondents who either enjoyed their trip to Oregon and were unsure if they would return, or had a mixed experience and were unsure if they would return (n = 29).

Of these, 11 were unsure if they would return to Oregon because they are more interested in visiting other states or regions, and 9 were unsure because they had had difficulty traveling to Oregon. Only 8 indicated that there were not enough other interesting things to do in Oregon wine country.

Wine quality and high prices were mentioned by 7 and 6 respondents respectively as reasons they might not return.

Four or fewer were deterred by a lack of poor accommodations (4), poor or uninteresting places to eat (3), issues with reception and hospitality (2), or trouble travelling within Oregon wine country (2).

### Reasons Unsure Would Return to Oregon Wine Country

(Base = visited Oregon wine country)

	# 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

## KEY LEARNINGS

- ✓ High-frequency/High-end (HFHE) wine drinkers buy a considerable amount of wine in the under-\$20 price categories as well as wine in the \$20 and over price categories.
- ✓ The most important purchase factors when buying \$20+ wine is familiarity with the region or brand/producer, followed by recommendations from a friend or from on- and off-premise staff.
- ✓ Pinot Noir is the third most frequently purchased wine by HFHE respondents, behind Cabernet Sauvignon and red blends.
- ✓ In terms of familiarity, Oregon wine and wine from the Willamette Valley are on par with wine from Washington, with regular purchase rates of about one-third. Southern Oregon and Columbia Gorge are less well-known, with a regular purchase rates in the single digits.
- ✓ Those who identify themselves as regular Oregon wine buyers show no significant difference from other respondents in age distribution, but have a moderate male skew (76% vs. 60%). They show no significant

differences in purchase influence factors (press, personal recommendations, scores, etc.). However, they are significantly more frequent readers of the *Wine Spectator* and *Wine Advocate* and more engaged with online wine media such as Wine-Searcher, blogs, discussion groups, as well as more likely to tweet or post about wine using Delectable. They are directionally (not quite achieving statistical significance) more engaged in nearly all other types of wine media. Not only do they purchase Oregon wine more often, but they also purchase most of the listed varieties in general more often than other respondents, especially Pinot Noir, Riesling and Syrah.

- ✓ Despite high levels of awareness and trial, and greater likelihood of visitation, California residents are less favorable towards Oregon wines than residents of the rest of the U.S. They rate Oregon lower on quality and value, and are less likely to drink Oregon wine “regularly” than residents of all other states. They are also less likely to be familiar with Oregon varieties other than Pinot Noir, and more likely to agree Oregon wines have lower visibility.



- ✓ On an unaided basis, Oregon is overwhelmingly known as a Pinot Noir producer. Sonoma County is also known as a Pinot Noir producer, but at a much lower rate. Napa Valley and Washington State are best known for their Cabernet Sauvignon production. Walla Walla Valley is known for its Syrah, just as much as it is known for its Cabernet Sauvignon.
- ✓ Again on an unaided basis, the Willamette Valley is the Oregon wine region best known for Pinot Noir (44%), with one-third of respondents citing high quality. Pinot Noir was also the leading association with Southern Oregon (25%), but the region also had significant mention (7%) of being underdeveloped or little-known. Columbia Gorge associations are not dominated by any particular wine varietal or type of wine, although Cabernet Sauvignon leads (7%), followed by associations with quality or value.
- ✓ Not surprisingly, survey participants were most familiar with Oregon Pinot Noir, followed by Pinot Gris and red blends, then Cabernet Sauvignon and Chardonnay. One-third were not aware that Riesling, Syrah, and Pinot Blanc are produced in Oregon, and nearly two-thirds were not aware that Tempranillo is produced in Oregon.
- ✓ Respondents rated wine from the Willamette Valley higher in quality than wine simply identified as Oregon wine. Oregon was rated "good" by half the respondents, and a majority rated the wines of Southern Oregon and Columbia Gorge "good" on quality. The quality of Willamette Valley wine is perceived as higher quality than that produced in Walla Walla Valley or Washington state in general.
- ✓ Washington wine and wine produced in the Walla Walla Valley were assessed as being better values than Oregon wine and wine from all of the Oregon wine regions. Willamette Valley and Columbia Gorge wines are considered better values than wines from Southern Oregon or from Oregon in general, but only by a very slight margin.
- ✓ Quality ratings for Oregon wine were higher among regular Pinot Noir drinkers and regular Oregon wine buyers, but not among those who had visited Oregon wine country. Regular Oregon wine buyers consider Oregon wines a better value than other respondents.

- ✓ Oregon’s share of the HFHE consumer’s attention is high for Pinot Noir and Pinot Gris, substantially lower for Riesling and Pinot Blanc, and low for the other varieties tested. Half of those who drink Pinot Noir and Pinot Gris weekly or monthly choose to drink Oregon Pinot Noir and Pinot Gris at least monthly. Less than one-fifth of Riesling and Pinot Blanc drinkers choose to drink these varietals from Oregon. Less than one in ten respondents who drink all other varietal and wine types at least monthly (i.e., Chardonnay, Cabernet Sauvignon, red Blends, Syrah, and Tempranillo), choose to drink these varietal/wines from Oregon at least monthly.
- ✓ Oregon wines are most often associated by HFHE wine consumers with many small artisan producers or family wineries, followed by being food friendly. In addition, just over half associate Oregon wines with being a good value for the money and being sustainably farmed or produced.
- ✓ The top reasons some HFHE respondents do not regularly buy Oregon wine included a preference for wines from other regions, little knowledge about Oregon wines, and rarely or never seeing Oregon wines where they shop.
- ✓ Over half of the HFHE respondents had exposure to Oregon wines through a visit to Oregon wine country, attending an Oregon wine tasting, or joining an Oregon winery wine club, in that order. Those who have visited Oregon wine country skew slightly older compared to those who have not visited. Millennials are the least likely to have visited Oregon wine country. Men are more likely to have visited Oregon wine country and to have joined an Oregon winery wine club than females. Pinot Noir drinkers have had more exposure to Oregon wines through visitation, wine tastings, and wine clubs.
- ✓ The most often visited Oregon wine region is the Willamette Valley (about one-third of HFHE respondents). Approximately one-quarter have visited Southern Oregon and Columbia Gorge.
- ✓ Of those HFHE wine consumers who have visited Oregon wine country, the top factors that influenced their visit was having tried Oregon wine and wanting to visit the wineries, and an interest in discovering new wines.



- ✓ Of the respondents who have visited Oregon wine country, most have enjoyed it and plan to return. Visitors most enjoy the quality of Oregon wines and the discovery of new wines and wineries, as well as the friendliness and hospitality they experienced and Oregon's scenic and natural beauty.
- ✓ Visitors to Oregon wine country did not rate Oregon wines significantly higher, but were nearly twice as likely to purchase Oregon wines regularly as non-visitors. They were more likely to associate Oregon wines with all the attributes that might be attributed to Oregon wine other than “good value.” They skew somewhat older and more male, and purchase wines costing over \$30 more often than non-visitors.

# Oregon Consumer Survey 2015

1. What is your age?

*(Drop-down box with exact ages except for “under 21” and “70 or over”)*

Weekly	Monthly	Several Times a Year	Less Often	Never
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2. What is your gender?

- Male
- Female

- Under \$10
- \$10 - \$19.99
- \$20 - \$29.99
- \$30 - \$49.99
- \$50.00 or more

3. In what state do you live? *(Drop-down list of states)*

4. On average, how often do you drink wine?

- Every day
- A few times a week
- About once a week
- Several times a month
- About once a month
- Once every 2-3 months
- Less often than once every 2-3 months *(Disqualifies)*

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.

Weekly	Monthly	Several Times a Year	Less Often	Never
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5. Please indicate how often, on average, you buy wine at a retail store (not restaurant) in these price ranges (per 750ml bottle)?

- |             |                           |
|-------------|---------------------------|
| Pinot Noir  | Cabernet Sauvignon        |
| Chardonnay  | Syrah                     |
| Riesling    | Tempranillo               |
| Pinot Gris  | Red Blends                |
| Pinot Blanc | <i>(Varieties Rotate)</i> |

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

I know little or nothing about wines from this region and haven't tried them	I have heard about them but have not tried them	I have tried wine from this region once or twice	I have tried wine from this region a number of times	I buy or drink wines from this region regularly
--	---	--	--	---

Oregon  
 Napa Valley  
 Sonoma County  
 Washington  
 Willamette Valley  
 Southern Oregon  
 Columbia Gorge  
 Walla Walla Valley  
*(Regions rotate)*

8. 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. *(Open-ended text boxes next to each region)*

Oregon  
 Napa Valley  
 Sonoma County  
 Washington  
 Willamette Valley  
 Southern Oregon  
 Columbia Gorge  
 Walla Walla Valley  
*(Regions rotate)*

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."

Quality	Value
Oregon	Willamette Valley
Napa Valley	Southern Oregon
Sonoma County	Columbia Gorge
Washington	Walla Walla Valley

*(Regions rotate randomly; drop-down scales of "One of the best," "Excellent," "Good," "Fair," "Poor," "Undecided or don't know")*

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

Did not know this variety is grown in Oregon	Heard of this wine from Oregon but have not tried	Heard of and have tried from Oregon	Drink occasionally from Oregon	Drink monthly or more often from Oregon
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Pinot Noir	Cabernet Sauvignon
Chardonnay	Syrah
Riesling	Tempranillo
Pinot Gris	Red Blends
Pinot Blanc	<i>(Varieties Rotate)</i>

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

- Highly regarded by wine critics
- A wide variety of wines and styles
- Consistently high-quality wine
- Good value for money
- Sustainably farmed / produced
- Many small artisan producers or family wineries
- Food-friendly wines
- Readily available at shops or restaurants near me

*(Traits rotate randomly)*

12. Do you purchase wines from Oregon regularly?

Yes *(Skip to Q14)*

No *(Proceed to Q13)*

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.

- I rarely or never see Oregon wines where I shop for wine
- Oregon wines are too expensive
- Oregon wines are not good value for the money
- I know very little about wines from Oregon
- I don't like the taste of wines I have tried from Oregon
- I have found the wines of Oregon to be of inconsistent quality
- Oregon doesn't make wines of the varieties that I like the most
- I prefer wines from other regions
- I seldom see good reviews or high critics' scores on wines from Oregon
- People whose wine knowledge I trust do not recommend Oregon wines
- Other (Please comment)

*(Statements rotate except for "Other")*

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

5 = Highly important	4	3	2	1 = Not important at all
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High scores from a leading wine magazine or critic  
 A personal recommendation by store or restaurant staff

I have visited the wine region

I am very familiar with the region's wines

It is priced slightly below other wines I was considering

Recommendation from a friend

Read about the wine in an article or blog post

A brand / producer I have heard of or tried previously

Wine is made using organic or sustainably farmed grapes

*(Factors rotate)*

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

Weekly or more often	1 – 3 times a month	Occasionally	Rarely or never
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Wine Spectator  
 The Wine Advocate  
 Wine-Searcher.com  
 Food & Wine  
 Wine & Spirits  
 Wine Enthusiast  
 Wine blogs or discussion groups  
 Snooth  
 Wine.com  
 WineFolly.com  
 The wine column in my local paper  
 Other (please list the source you follow the most often)

*(Media choices rotate except for "Other")*

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

Daily	Several times a week	1 – 4 times a month	Less often	Don't use this social media
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Facebook  
 Twitter  
 Delectable  
 Pinterest

Instagram  
 Vivino  
 YouTube

*(Social media channels rotate)*

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

Visited 2 or more times in past 2 years	Visited once in past 2 years	Visited, but more than 2 years ago	Have not visited
---	------------------------------	------------------------------------	------------------

Napa Valley	Southern Oregon
Sonoma County	Columbia Gorge
Washington (other than Walla Walla)	Walla Walla Valley
Willamette Valley	<i>(Regions rotate)</i>

18. Have you ever done any of the following?

Visited Oregon wine country *(If selected, proceed to Q19; if not skip to end)*  
 Attended a tasting event featuring Oregon wines  
 Joined the wine club of an Oregon winery

19. What factors influenced your decision to visit Oregon wine country? (Please select up to three.)

Travel tools and information provided by a winery or wine association  
 Friend/family recommendation  
 Attending a wine focused festival or event  
 Read about it in a travel magazine / book / website  
 Read about it in a wine or food magazine / book / website  
 Wanted to purchase wines not available in my area  
 Wanted to discover new wines

Had previously tried Oregon wine and wanted to visit the wineries  
 Other (please enter below)

20. Which of the following statements best summarizes your experience in Oregon wine country?

I greatly enjoyed it and plan to return some day *(Proceed to Q21a)*  
 I enjoyed it, may or may not return *(Skip to Q21b)*  
 I had a mixed experience, may or may not return *(Skip to Q21b)*  
 I did not enjoy my visit, or enjoyed it less than I expected *(Skip to Q21c)*

21a. Which of the following traits or features of Oregon Wine Country did you enjoy the most? (Please select up to three)

Quality of the wines  
 Friendliness and hospitality of the people and wineries  
 Discovering new wines and wineries  
 Good food and restaurants  
 Scenic and natural beauty  
 Accommodations, lodging or hotels  
 Prices of wine and/or tasting fees  
 Ease of travel to Oregon wine country

Easy to travel within wine region  
Other (non-wine) attractions in wine country  
Other (please specify)

*(Skip to end)*

21b. Which of the following traits or features of Oregon Wine Country make you unsure whether you will return? (Please select up to three)

Quality of the wines  
Reception and hospitality issues  
High prices of wine and/or tasting fees  
Difficulty of travel to Oregon wine country  
Difficulty of travel within Oregon wine country  
Lack of or poor accommodations and hotels  
Poor or uninteresting places to eat  
Not enough other interesting things to do in the area  
More interested in visiting other states or regions  
Other (please specify)

*(Skip to end)*

21c. Which of the following traits or features of Oregon Wine Country most contributed to why you did not enjoy your trip? (Please select up to three)

Poor quality of the wines  
High prices for wines and/or tasting room fees  
Difficulty of travel to Oregon wine country  
Difficulty of travel within Oregon wine country  
Poor or uninteresting places to eat  
Lack of or poor accommodations and hotels  
Unfriendly or inhospitable wineries  
Not enough other interesting things to do in the area  
Other (please specify)



“ **Wine Opinions** ”

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