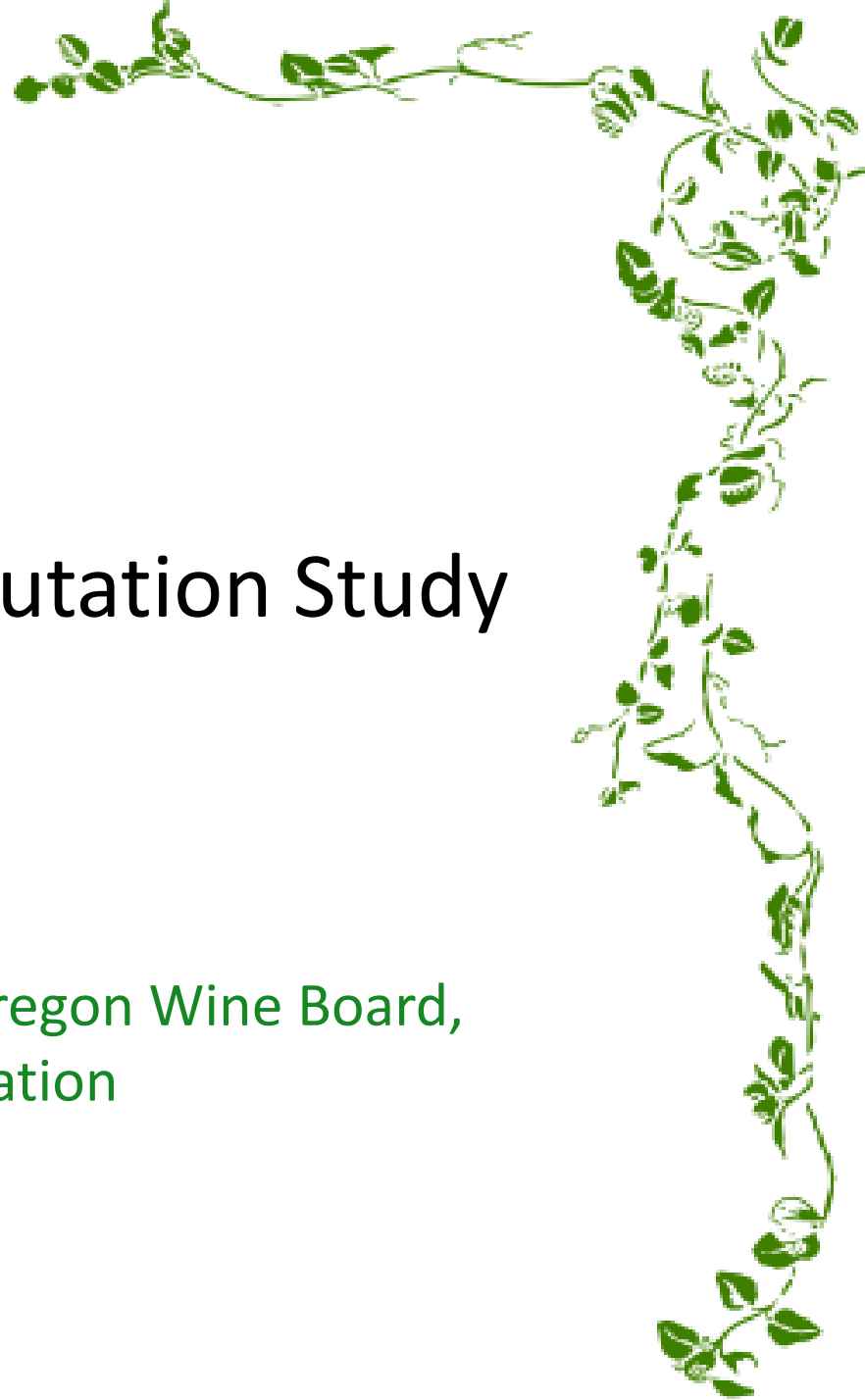
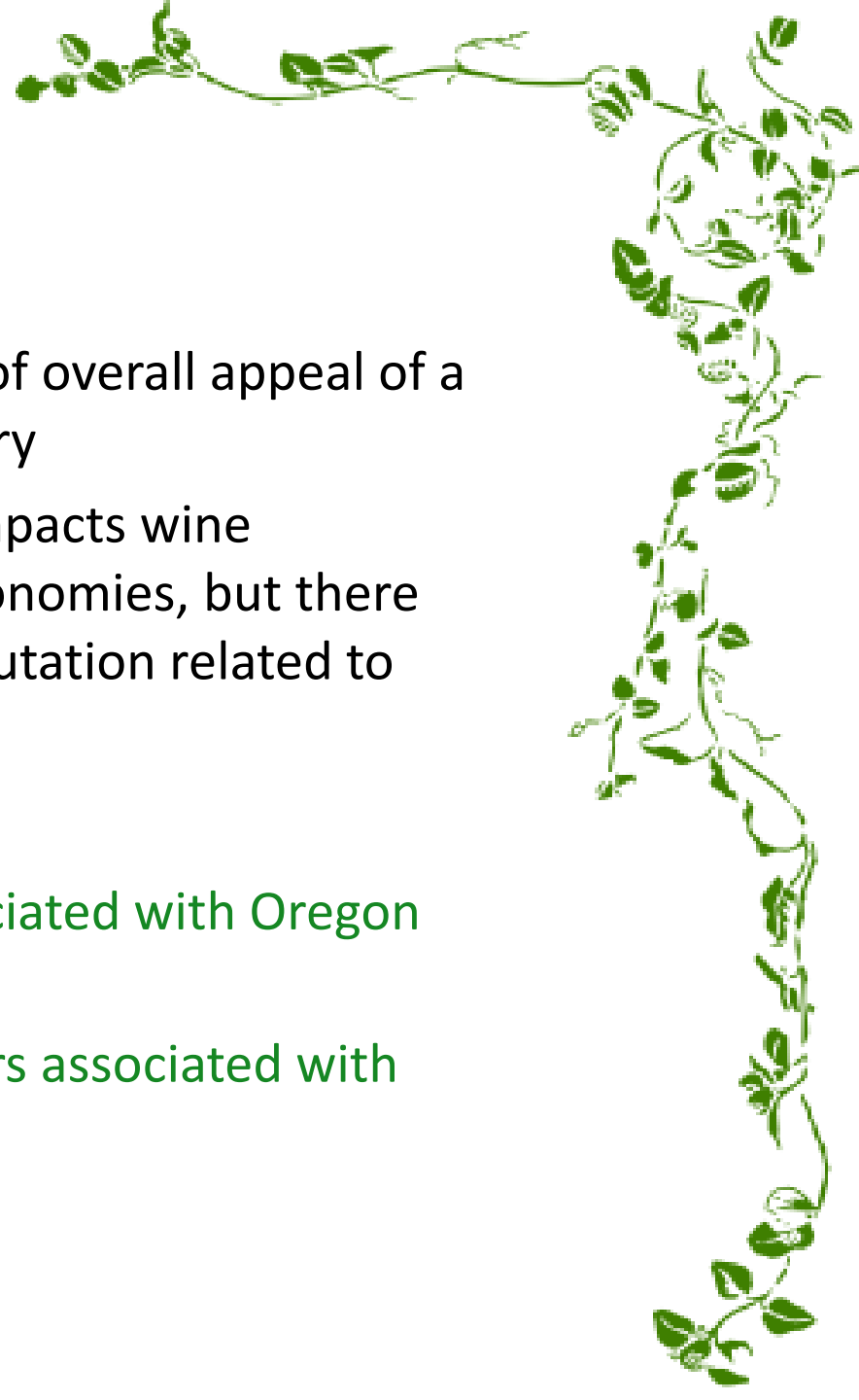


# 2013 Oregon Wine Reputation Study

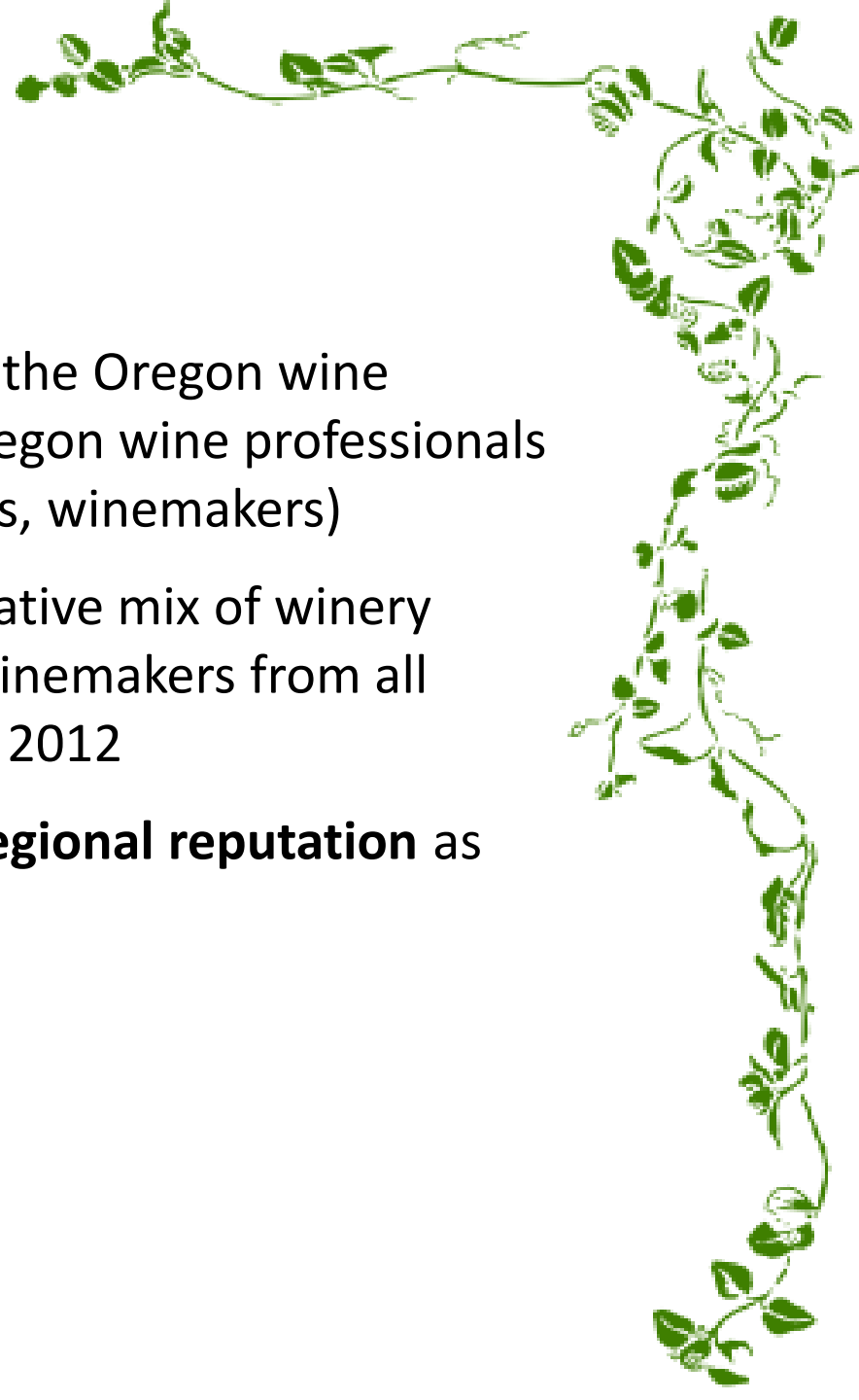
Study Partners: Linfield College, Oregon Wine Board,  
Willamette Valley Wineries Association





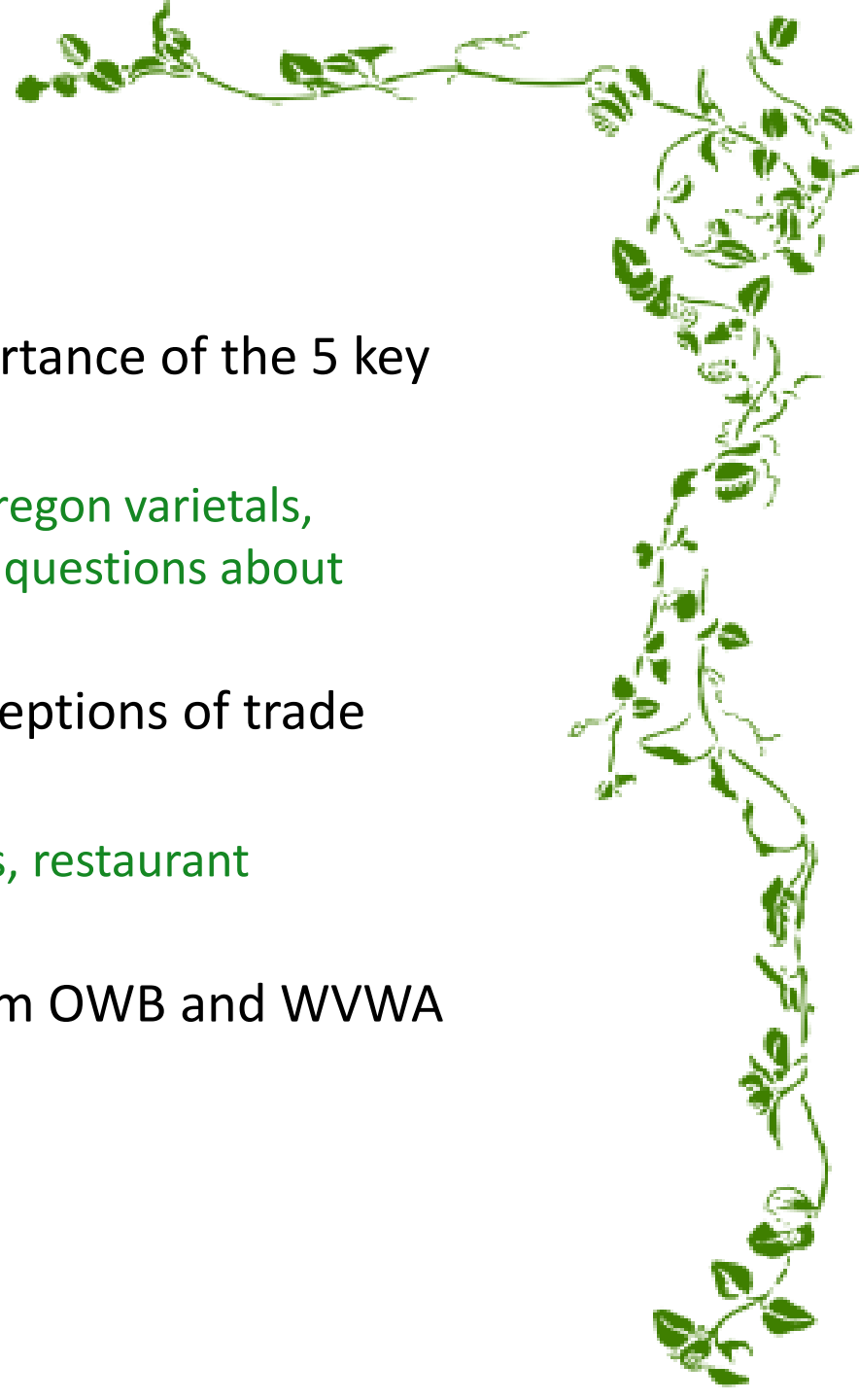
# Background

- Reputation: aggregate assessment of overall appeal of a company, industry, region, or country
- Reputation of wine/wine regions impacts wine purchase decisions and regional economies, but there is a lack of research on regional reputation related to Oregon wine
- Study objectives
  - Assess regional reputation associated with Oregon wine
  - Increase understanding of factors associated with the purchase of Oregon wine



# Interview Phase

- Purpose: Learn about reputation of the Oregon wine industry from the perspective of Oregon wine professionals (winery founders, owners, managers, winemakers)
- Nineteen interviews with representative mix of winery founders, owners, managers, and winemakers from all Oregon AVAs during summer/fall of 2012
- Results: **5 key factors of Oregon's regional reputation** as perceived by industry insiders:
  - Hand crafted/artisan wines
  - Organic or sustainably made wines
  - Small family farms
  - Community/collaboration
  - Stewardship of the land



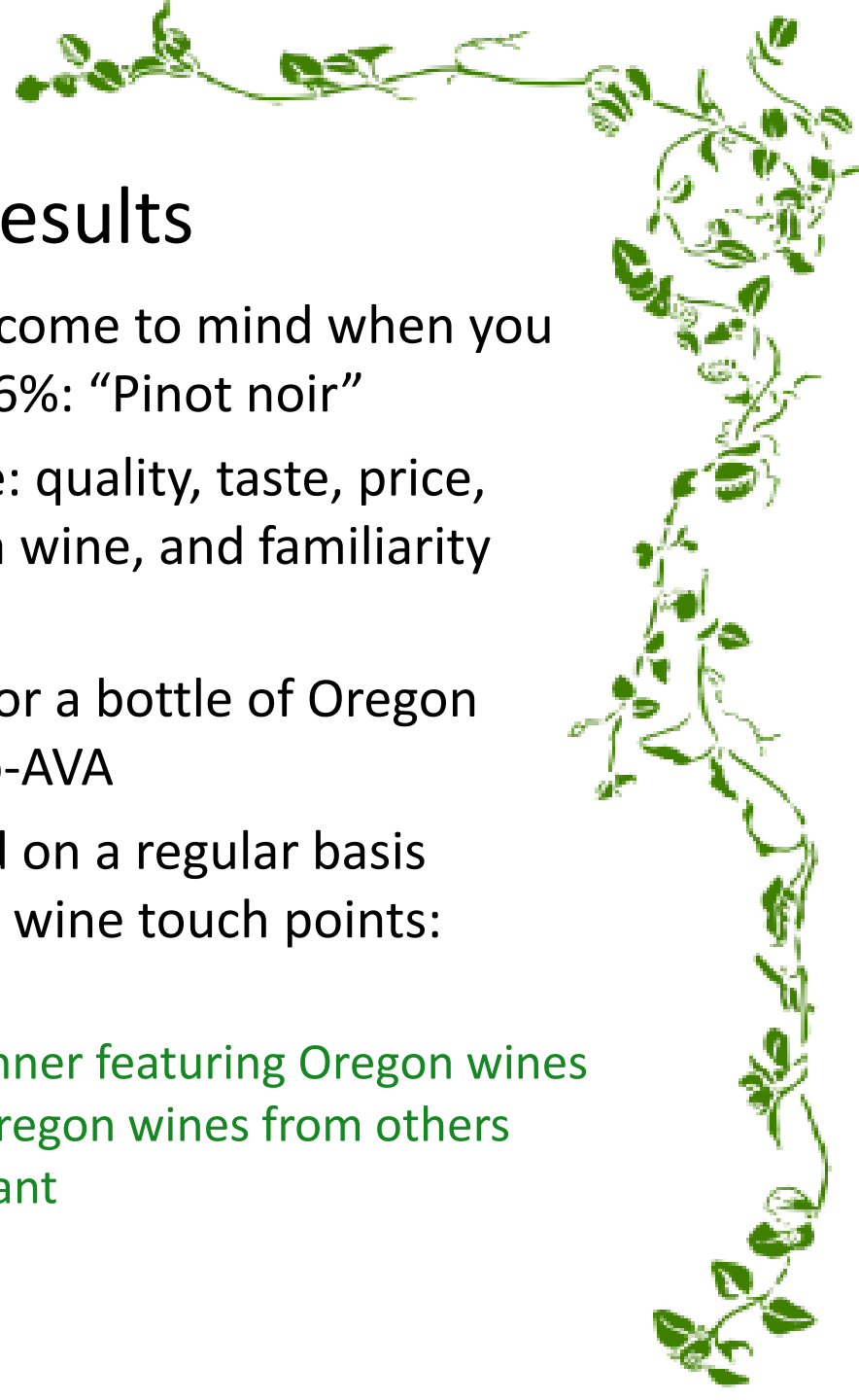
# Survey Phase

- Consumer survey investigated importance of the 5 key factors identified in the interviews
  - Also asked about familiarity with Oregon varietals, perceptions of California wine, and questions about demographics and buying behavior
- Parallel trade survey examined perceptions of trade professionals
  - Distributors, retailers, restaurateurs, restaurant managers, and sommeliers
- Invitees identified via email lists from OWB and WVWA

# Survey Phase

- Online surveys live Jan-Feb 2013: 1,020 consumer and 315 trade respondents; 4.2% and 14.4% response rates
- Respondents drawn from across the U.S.; 5% of consumer respondents reported international zip codes
- Consumer survey: 54% female; varied in age and income level; nearly 80% with bachelor's degree or above
- Trade survey
  - 35% wine retailers, 17% sommeliers, 15% wine distributors, 10% restaurant owners, 9% restaurant managers
  - Nearly 75% with 10+ years in wine- or restaurant-related field; 85% with responsibility for wine buying
  - 92% had visited an Oregon winery





# Survey Phase: Consumer Results

- “What are the first 2-3 words that come to mind when you hear the words ‘Oregon Wine’?” 56%: “Pinot noir”
- Important factors in wine purchase: quality, taste, price, pairing, previous experience with a wine, and familiarity with wine region and label
- Willing to spend more than usual for a bottle of Oregon wine based on region and AVA/sub-AVA
- Amount of Oregon wine purchased on a regular basis increases with exposure to Oregon wine touch points:
  - Visiting an Oregon winery
  - Attending a tasting/winemaker dinner featuring Oregon wines
  - Receiving recommendations for Oregon wines from others
  - Drinking Oregon wine at a restaurant
  - Reading about Oregon wine

# Survey Phase: Consumer Results

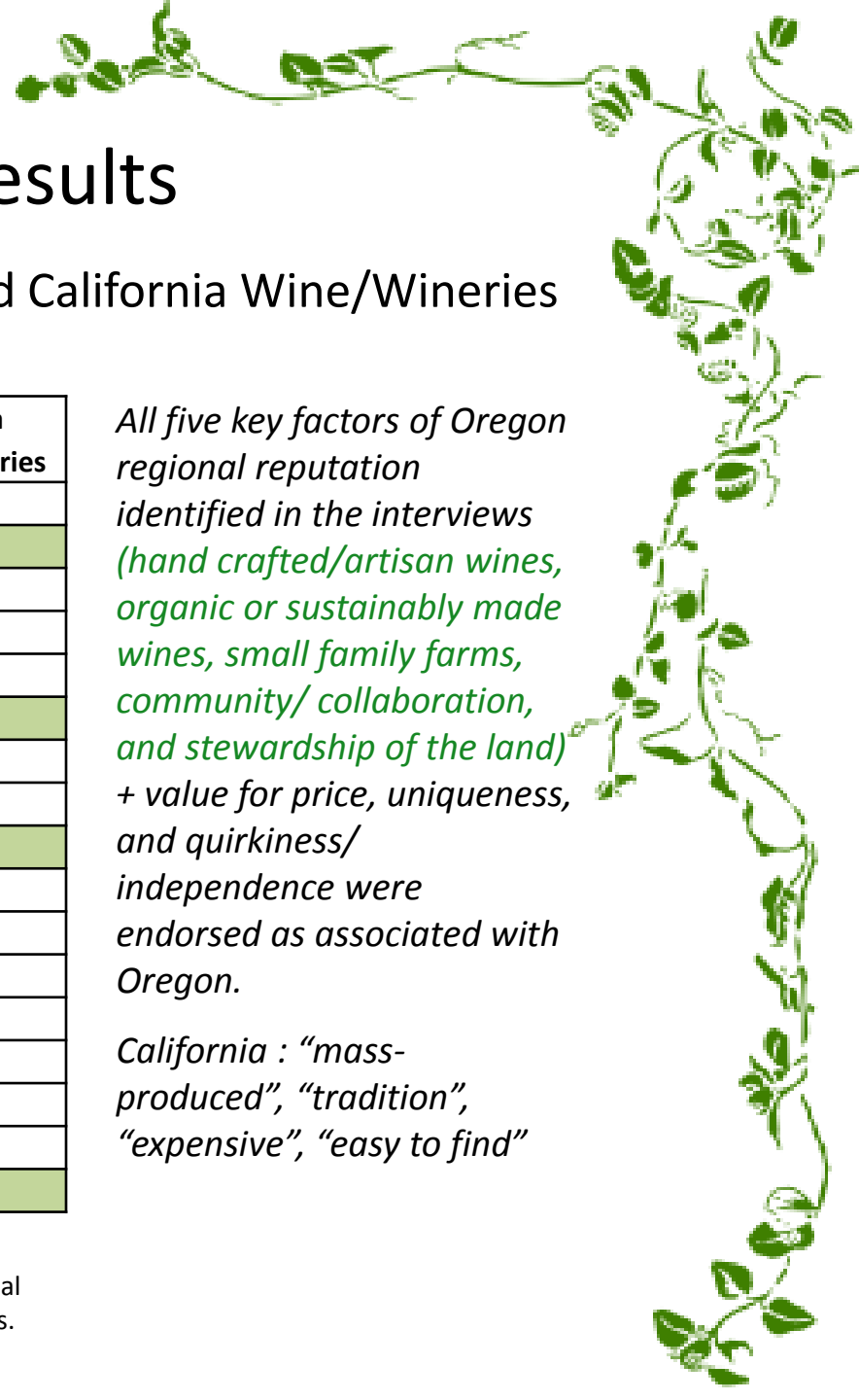
## Characteristics Associated with Oregon and California Wine/Wineries

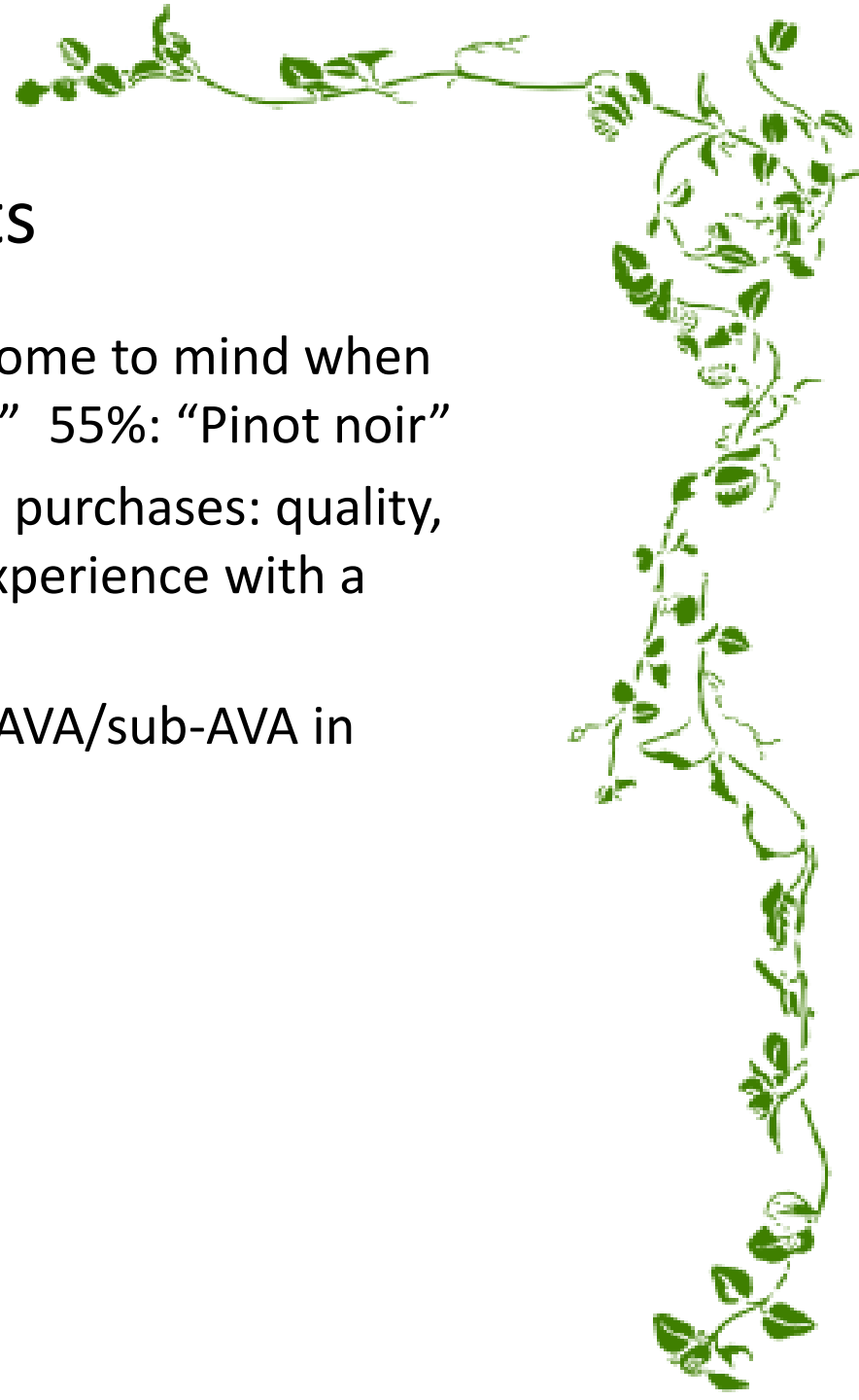
Characteristic	Oregon Wines/Wineries	California Wines/Wineries
World class wines	779	790
Mass produced wines	73	<b>797</b>
A travel destination for wine tourism	774	865
Hand crafted/artisan wines	<b>837</b>	520
Organic or sustainably made wines	<b>603</b>	226
Tradition	297	<b>636</b>
Small family farms	<b>830</b>	283
High-quality wines	867	798
Expensive wines	486	<b>737</b>
Trend setting	375	389
Value for price	<b>583</b>	415
Uniqueness	<b>666</b>	236
Food + wine connection	549	534
Community/collaboration	<b>497</b>	172
Stewardship of the land	<b>590</b>	208
Quirkiness/independence	<b>603</b>	131
Easy to find when I buy wine	307	<b>724</b>

Total responses: 948. Highlighted boxes indicate sizeable differences in the number of endorsements for a characteristic (differing by at least 10% of the total responses to that characteristic). Twenty individuals provided “other” responses.

*All five key factors of Oregon regional reputation identified in the interviews (hand crafted/artisan wines, organic or sustainably made wines, small family farms, community/ collaboration, and stewardship of the land) + value for price, uniqueness, and quirkiness/ independence were endorsed as associated with Oregon.*

*California : “mass-produced”, “tradition”, “expensive”, “easy to find”*



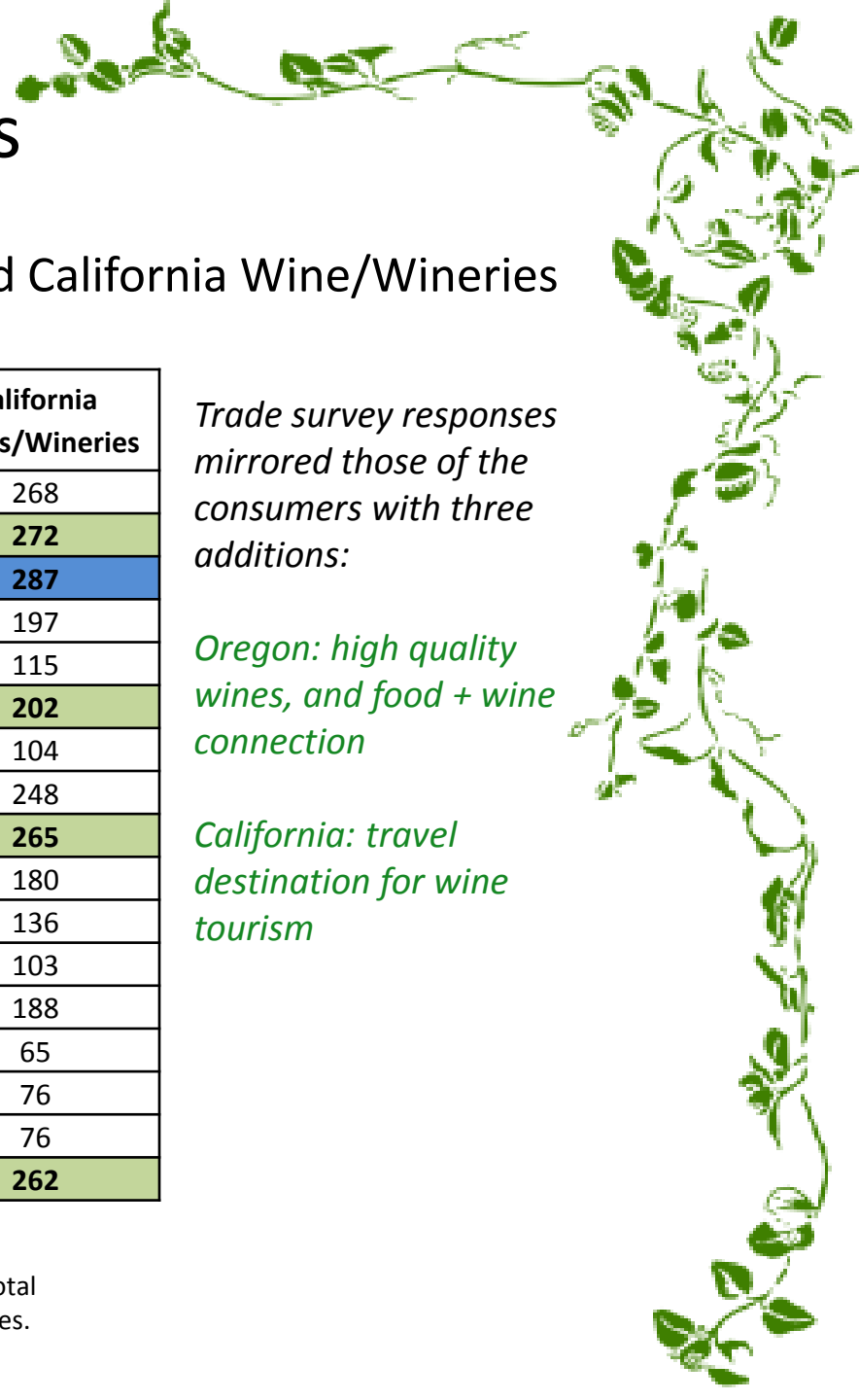


## Survey Phase: Trade Results

- “What are the first 2-3 words that come to mind when you hear the words ‘Oregon Wine’?” 55%: “Pinot noir”
- Important factors for clients in wine purchases: quality, taste, price, pairing, and previous experience with a wine
- Affirmed importance of region and AVA/sub-AVA in selling/placing wine with clients



# Survey Phase: Trade Results



## Characteristics Associated with Oregon and California Wine/Wineries

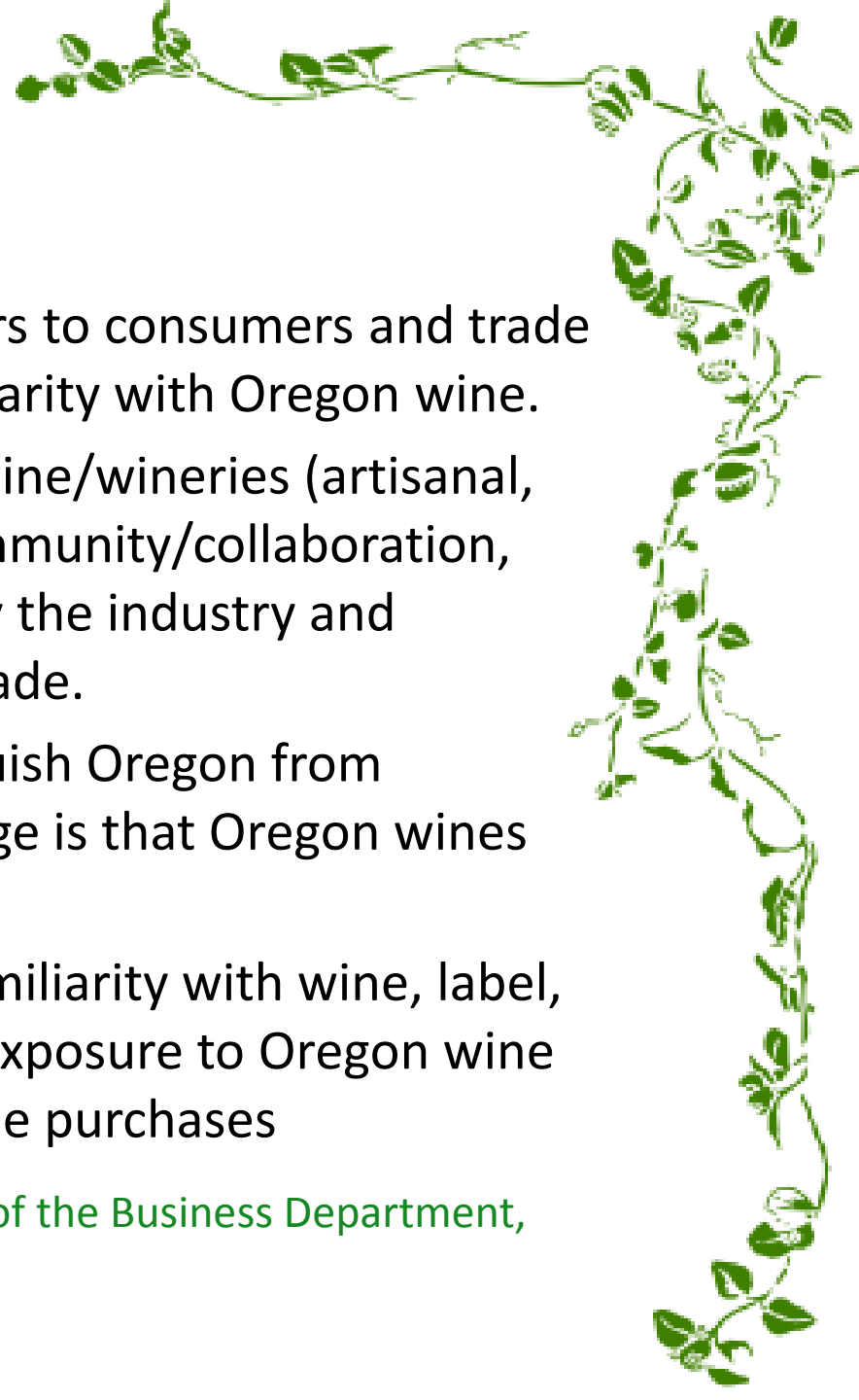
Characteristic	Oregon Wines/Wineries	California Wines/Wineries
World class wines	270	268
Mass produced wines	16	<b>272</b>
A travel destination for wine tourism	188	<b>287</b>
Hand crafted/artisan wines	<b>290</b>	197
Organic or sustainably made wines	<b>254</b>	115
Tradition	147	<b>202</b>
Small family farms	<b>285</b>	104
High-quality wines	<b>287</b>	248
Expensive wines	182	<b>265</b>
Trend setting	160	180
Value for price	<b>181</b>	136
Uniqueness	<b>251</b>	103
Food + wine connection	<b>258</b>	188
Community/collaboration	<b>255</b>	65
Stewardship of the land	<b>259</b>	76
Quirkiness/independence	<b>253</b>	76
Easy to find when I buy wine	115	<b>262</b>

*Trade survey responses mirrored those of the consumers with three additions:*

*Oregon: high quality wines, and food + wine connection*

*California: travel destination for wine tourism*

Total responses: 294. Highlighted boxes indicate sizeable differences in the number of endorsements for a characteristic (differing by at least 10% of the total responses to that characteristic). Twenty individuals provided "other" responses.



# Conclusions

- Oregon's regional reputation matters to consumers and trade professionals who have some familiarity with Oregon wine.
- Five key characteristics of Oregon wine/wineries (artisanal, sustainable, small family farms, community/collaboration, and stewardship) were identified by the industry and confirmed by consumers and the trade.
- These five factors positively distinguish Oregon from California, but a distinct disadvantage is that Oregon wines are not as easy to find.
- Quality, taste, price, and pairing; familiarity with wine, label, and region; and multiple points of exposure to Oregon wine are important factors in Oregon wine purchases

Questions? Contact Sharon Wagner, Chair of the Business Department,  
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