Capiche 2016 Survey of Oregon Tasting Rooms

Vicki T. Purslow, EdD

Chris Cook

541.601.0114 | chris@capiche.us | 1275 Neil Creek Rd. | Ashland, OR 97520

capiche.wine

Table of Contents

List of Tables

I. Introduction

Acknowledgements

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Purpose

The purpose of the study was to examine trends and opportunities for growth specific to Oregon tasting rooms. Comparing findings with previous research, including the Wine Business Monthly/Silicon Valley Bank reports, we sought to learn more about Oregon tastings rooms by American Viticultural Area (AVA) and annual case production.

Methodology

Data were collected between August and November 2016. More than 72% of Oregon tasting rooms participated. Tasting rooms were identified by combining lists from the Oregon Wine Board, the *Wines and Vines* print and online directories, and online research of Oregon AVAs. For tasting rooms with multiple locations, only the primary location was included in the study. The number of tasting rooms eligible to participate was 359.

Data are presented two ways. First, data are presented by AVA: Columbia Gorge, Southern Oregon, and Willamette Valley. Because sample sizes from the Columbia Valley, Snake River Valley, and Walla Walla are small, these data are reflected only in the annual case production size reports, in a commitment to protect anonymity of those participating in the survey. Second, data are presented by annual case production: 1 – 2,500; 2,501 – 5,000; 5,001 - 10,000; 10,000 – 25,000, and more than 25,000. The intent is to provide tasting room comparable data by AVA and annual case production with others throughout Oregon.

Assumptions and Limitations

It was assumed that participants responded accurately and honestly to the survey questions. To mitigate any bias that may arise and encourage honesty in responses, participants were promised confidentiality. The findings of the study are limited in generalizability to tasting rooms in Oregon. The survey findings are intended to provide a picture of the tasting room experience in Oregon and serve as a reference point for additional study.

Participants

Every Oregon tasting room was invited to participate in the survey. Tasting rooms were invited to participate through email. Nonrespondents were sent paper copies of the survey to complete and return. For those who remained nonresponders, one final email was sent to encourage participation. The researchers also visited more than 80 tasting rooms to encourage participation.

Tasting room participants included 14 from the Columbia Gorge AVA, 62 from the Southern Oregon AVA, 7 from the Walla Walla AVA, 175 from the Willamette Valley AVA, and 1 each from the Columbia Valley and Snake River Valley AVAs. The total number of participating tasting rooms was 260 of 359 (tasting rooms with multiple locations were counted once).

Tables that include data by annual case production include all survey respondents, including Columbia Valley, Snake River, and Walla Walla AVAs. Of the 260 tasting rooms represented in the study, 45% had an annual case production of 1 – 2,500. Nearly 22% produced 2,501 – 5,000 cases, 16% produced 5,001 – 10,000 cases, 9% produced 10,001 – 25,000 cases, and 8% produced more than 25,000 cases.

II. Report

This report reflects the findings from the "Capiche 2016 Survey of Oregon Tasting Rooms." There are regional nuances that are not reflected here but will be reported in greater depth in 2017, when Capiche presents additional findings to regional wine associations in Oregon.

Years Tasting Rooms Have Been Open

These data were collected to allow for identification of trends specific to subsequent questions posed in the survey. The years tasting rooms have been open largely mirror historical development of the Oregon wine industry.

Table 1
Years Tasting Room Has Been Open by AVA.

Length of Time	Columbia Gorge	S. Oregon	Willamette
Less than 5 years	36%	33%	27%
5 - 9 years	43%	26%	26%
10 - 14 years	21%	25%	22%
More than 14 years	0%	16%	25%

Table 2
Years Tasting Room Has Been Open by Annual Case Production.

Length of Time	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Less than 5 years	37%	29%	29%	17%	0%
5 - 9 years	31%	40%	19%	13%	14%
10 - 14 years	24%	15%	29%	17%	19%
More than 14 years	8%	16%	24%	52%	67%

Tasting Room Operations

Tasting room operations matter because 47% of direct-to-consumer (DTC) sales come from tasting rooms (Penn, 2016, p. 50). The smaller the case production, the more reliant tasting rooms are on DTC sales.

While previous research has shown that tasting rooms open by appointment only report substantively higher purchase amounts than their public counterparts, appointment-only tastings require greater effort to obtain customers. The customers that do come through the appointment-only door are more apt to make larger purchases.

Table 3
Availability of Tasting by AVA.

Availability of Tasting	Columbia Gorge	S. Oregon	Willamette
Open to the public	71%	67%	59%
Open to the public and by appointment	29%	30%	33%
Open by appointment only	0%	2%	7%

Table 4
Availability of Tasting by Annual Case Production.

Availability of Tasting	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Open to the public	50%	65%	62%	74%	86%
Open to the public and by appointment	39%	31%	33%	22%	14%
Open by appointment only	9%	4%	2%	4%	0%

According to Rob McMillan, founder of the Silicon Valley Bank's wine division, "In the case of hours or days, it depends on the style, type and location of a winery. By-appointment wineries might have variable schedules. Remote wineries might have an owner living on the property so effectively they are open 24/7. Wineries on a tourist trail might want to be open as long as there is traffic, or they may be restricted to the hours a planning commission allows."

Whatever the case, each winery is encouraged to set its tasting room schedule to suit its brand and the needs of its customers.

Days of Operation

While the larger wineries tend to be more likely to operate seven days a week all year round, smaller wineries often operate on seasonal schedules. What's most important is that wineries make their days and hours of operation clear and easy to find on a mobile-friendly website.

Table 5
Days of Operation by AVA.

Days of Operation	Columbia Gorge	S. Oregon	Willamette
7 days a week year round	29%	40%	48%
6 days a week year round	0%	2%	3%
5 days a week year round	0%	14%	10%
4 days a week year round	7%	9%	4%
3 days a week year round	29%	10%	7%
Varies seasonally	43%	12%	15%

Table 6
Days of Operation by Annual Case Production.

Days of Operation	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
7 days a week year round	25%	40%	56%	74%	100%
6 days a week year round	2%	4%	2%	4%	0%
5 days a week year round	13%	9%	20%	4%	0%
4 days a week year round	6%	9%	2%	0%	0%
3 days a week year round	9%	13%	5%	0%	0%
Varies seasonally	25%	7%	10%	13%	0%

Opening Hour of Operation

While 11 am is the most common time for tasting rooms to open, winery owners take lunch service into consideration. Some see food service as another revenue stream while others feel it takes away from the pure wine tasting experience.

Table 7

Opening Hour of Operation by AVA.

Opening Hour	Columbia Gorge	S. Oregon	Willamette
10 am	0%	10%	10%
11 am	29%	51%	54%
12 pm	71%	42%	30%
1 pm	0%	3%	2%

Table 8

Opening Hour of Operation by Annual Case Production.

Opening Hour	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
10 am	1%	7%	17%	4%	14%
11 am	40%	55%	46%	70%	86%
12 pm	48%	33%	27%	26%	0%
1 pm	5%	2%	2%	0%	0%

Closing Hour

"Are you a tasting room or a bar?" is a question that wine marketing consultants will ask. Many things come into play around hours of operation including the key performance indicators for the winery: wine club sign-ups, bottles sold, wines sold by the glass, etc. Closing hours may vary seasonally as well.

Table 9
Closing Hour by AVA.

Closing Hour	Columbia Gorge	S. Oregon	Willamette
4 pm	0%	3%	10%
5 pm	57%	64%	70%
6 pm	29%	17%	10%
7 pm	14%	10%	2%
8 pm	0%	2%	0%
9 pm	0%	0%	3%

Table 10
Closing Hour by Annual Case Production.

Closing Hour	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
4 pm	5%	9%	12%	0%	10%
5 pm	63%	69%	71%	83%	67%
6 pm	18%	11%	7%	4%	5%
7 pm	6%	4%	5%	4%	5%
8 pm	1%	2%	0%	0%	0%
9 pm	2%	2%	0%	4%	5%

Service Types

Tasting rooms were asked to identify the types of services available, including standing tasting bars, seated tasting bars, casual or group seating, private or formal seating, indoor seating, and outdoor seating. The most prevalent style of tasting, by both AVAs and annual case production, was the standing tasting bar.

Table 11
Types of Service Available by AVA.

Service Type	Columbia Gorge	S. Oregon	Willamette
Standing tasting bar	93%	88%	88%
Seated tasting bar	79%	53%	53%
Casual or group seating	100%	73%	70%
Private or formal seating	36%	31%	38%
Indoor	100%	93%	89%
Outdoor	57%	88%	78%

Table 12
Types of Service Available by Annual Case Production.

Service Type	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Standing tasting bar	85%	93%	93%	83%	95%
Seated tasting bar	62%	49%	49%	48%	43%
Casual or group seating	74%	73%	71%	61%	76%
Private or formal seating	30%	29%	41%	43%	57%
Indoor	90%	93%	93%	87%	95%
Outdoor	74%	82%	80%	78%	86%

These findings are noteworthy because research has shown that seated tasting yields more wine club growth and a higher average wine purchase (McMillan, 2015). To increase club conversation rates, tasting rooms need seating. If seating is at a distance from the bar, tasting room staff must have an intentional strategy for building a relationship with guests, which may require additional staffing.

Minors in the Tasting Room

The choice to have a family-friendly winery is often grounded in personal beliefs. For tasting rooms that welcome minors, there are many opportunities for marketing as a family-friendly winery, including numerous blogs and websites.

Table 13
Minors in the Tasting Room by AVA.

Minors	Columbia Gorge	S. Oregon	Willamette
Allowed in all locations	36%	59%	76%
Allowed in restricted areas	50%	29%	17%
Not allowed	14%	12%	7%

Table 14
Minors in the Tasting Room by Annual Case Production.

Minors	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Allowed in all locations	63%	60%	73%	100%	90%
Allowed in restricted areas	21%	36%	25%	0%	10%
Not allowed	16%	4%	3%	0%	0%

Beer Availability

With more than 230 brewing companies in Oregon, there may be opportunities for the wine and beer industries to partner together as is done in other states. For example, Greenport Harbor Brewing and the Blue Point Brewing Companies have partnered with Long Island-area wineries in New York to cross-market. The wineries serve the craft beer on tap and the brewing companies feature wines of Long Island's North Fork.

In Oregon tasting rooms, the type and quality of beer selections varies; some wineries list beer on their menus, while others do not and have beer available only upon request.

Table 15
Beer Availability by AVA.

Beer	Columbia Gorge	S. Oregon	Willamette
Available for purchase	43%	58%	18%
Not available for purchase	57%	42%	82%

Table 16
Beer Availability by Annual Case Production.

Beer	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Available for purchase	35%	31%	15%	26%	24%
Not available for purchase	65%	69%	85%	74%	76%

Charge for Standard Tasting

Previous research had shown that the average tasting fee for Oregon was $13. Our findings suggest otherwise. We believe that the discrepancy lies in the numbers of participants in previous studies. Capiche's research included 260 Oregon tasting rooms, which far exceed the number of Oregon tasting rooms represented in previous studies. Previous studies also did not reflect regional or annual case production differences.

Table 17
Charge for Standard Tasting by AVA.

Standard Fee	Minimum	Maximum	Average	Range
Columbia Gorge	$0	$10	$9	$5
S. Oregon	$0	$16	$6	$16
Willamette	$0	$30	$11.35	$30

Table 18
Charge for Standard Tasting by Annual Case Production.

Standard Fee	Minimum	Maximum	Average	Range
1 – 2,500	$0	$25	$8.39	$25
2,501 – 5,000	$0	$20	$10	$20
5,001 – 10,000	$1	$25	$11.85	$24
10,001 – 25,000	$0	$30	$11.45	$30
>25,000	$0	$0	$10.70	$20

Number of Tastings Offered in a Standard Flight

Table 19
Number of Tastings Offered in a Standard Flight by AVA.

Number of Tastings	Minimum	Maximum	Average	Range
Columbia Gorge	3	8	5	5
S. Oregon	3	8	6	5
Willamette	1	10	5	9

Table 20
Number of Tastings Offered in a Standard Flight by Annual Case Production.

Number of Tastings	Minimum	Maximum	Average	Range
1 – 2,500	3	10	6	7
2,501 – 5,000	1	8	5	7
5,001 – 10,000	1	9	5	5
10,001 – 25,000	3	7	6	4
>25,000	3	8	5	5

Situations that Trigger Tasting Fee Waiver

Oregon tasting rooms compare very favorably to their North American peers, where only 35% of tasting rooms waive tasting fees for joining the wine club. Wine club membership builds brand loyalty and ambassadors and are very desirable, as opposed to selling a single bottle of wine or making a minimum purchase amount.

Although some tasting room leaders believe the waiver to be an effective sales tool, others argue that waivers tied solely to the wine club are more profitable. The average total revenue per wine club member in northern Oregon was $725, compared to $512 in southern Oregon (McMillan, 2015). The lifetime value of a wine club member is far greater than the value of a visitor who makes a minimal purchase or buys a few bottles of wine.

Oregon tasting rooms are far below the average in wine club conversions. The North American conversion rate averaged 6% in 2015, compared to only 3% in Oregon (Wine Business Monthly/Silicon Valley Bank, 2016, p. 52). This figure is complicated because it appears so few tasting rooms are tracking visitors, making it challenging to truly understand wine club conversion rates.

Table 21
Situations that Trigger Tasting Fee Waiver by AVA.

Waiver Type	Columbia Gorge	S. Oregon	Willamette
Spend a minimum dollar amount	21%	12%	44%
Purchase one or more bottles	64%	81%	45%
Join the wine club	79%	54%	66%

Table 22
Situations that Trigger Tasting Fee Waiver by Annual Case Production.

Waiver Type	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Spend a minimum dollar amount	22%	20%	51%	77%	50%
Purchase one or more bottles	65%	65%	41%	18%	50%
Join the wine club	49%	72%	72%	73%	89%

The amount that a customer must spend for a waiver of the tasting room fee varies by AVA and annual case production. Our findings, for the Willamette Valley AVA and tasting rooms with an annual case production of >5,000, are consistent with previous research, while reflecting different outcomes for the Columbia Gorge and Southern Oregon AVAs, and for tasting rooms annual case production of <5,000.

Research continues to show that wine club memberships have risen in the double digits every year since 2013. Yet, Oregon has among the lowest wine club conversion rates at only 3% in 2015 (Penn, 2016).

Amount Customers Must Spend for Waiver of Tasting Fee

These data are helpful because a customer is more likely to make the minimum purchase necessary to obtain a waiver of the tasting fee. Lower purchase minimums will result in lower purchase amounts. Tasting rooms will benefit from increased sales by eliminating a minimum purchase amount and granting waivers only for multiple bottle purchases or wine club memberships. If a customer can have a fee waived with a purchase of just $10 or $20, that is what the customer is more apt to spend.

Table 23

Amount Customer Must Spend for Waiver of Tasting Fee by AVA.

Amount Required Spending	Minimum	Maximum	Average	Most Common
Columbia Gorge	$20	$50	$33	$50
S. Oregon	$2	$150	$5	$20
Willamette Valley	$10	$600	$63	$50

Table 24

Amount Customer Must Spend for Waiver of Tasting Fee by Annual Case Production.

Amount Required Spending	Minimum	Maximum	Average	Most Common
<2,500	$2	$600	$60	$20
2,501 - 5,000	$12	$300	$48	$20
5,001 - 10,000	$10	$250	$59	$50
10,000 - 25,000	$23	$100	$47	$30 or $50
> 25,000	$15	$150	$59	$60

Number of Bottles a Customer Must Purchase to Trigger a Waiver of the Tasting Fee

As noted previously, lower purchase minimums will result in lower purchase amounts. If a customer can have a fee waived with the purchase of one bottle of wine, the customer is most apt to purchase just one bottle of wine. Tasting rooms are encouraged to increase the minimum purchase amount to two or more bottles.

Table 25
Number of Bottles a Customer Must Purchase to Trigger a Waiver of Tasting Fee by AVA.

Number of Bottles	Minimum	Maximum	Average	Range
Columbia Gorge	1	3	2	2
S. Oregon	1	6	2	5
Willamette	1	50	3	49

Table 26
Number of Bottles a Customer Must Purchase to Trigger a Waiver of Tasting Fee by Annual Case Production.

Number of Bottles	Minimum	Maximum	Average	Range
1 – 2,500	1	50	3	50
2,501 – 5,000	1	12	2	12
5,001 – 10,000	1	6	2	6
10,001 – 25,000	1	6	3	5
>25,000	1	6	3	5

Charge for Reserve Tasting

Previous research has shown that the average reserve tasting fee for Oregon was $27. Our findings suggest otherwise. We believe that the discrepancy lies in the numbers of participants in previous studies. Capiche's research included 260 Oregon tasting rooms, which far exceed the number of Oregon tasting rooms represented in previous studies. Previous studies also did not reflect regional or annual case production differences.

Table 27
Charge for Reserve Tasting by AVA.

Reserve Fee	Minimum	Maximum	Average	Range
Columbia Gorge	$5	$20	$11	$15
S. Oregon	$0	$25	$11	$25
Willamette	$0	$500	$30	$500

Table 28
Charge for Reserve Tasting by Annual Case Production.

Reserve Fee	Minimum	Maximum	Average	Range
1 – 2,500	$0	$500	$28	$500
2,501 – 5,000	$0	$30	$15	$30
5,001 – 10,000	$10	$75	$27	$65
10,001 – 25,000	$0	$150	$38	$150
>25,000	$0	$75	$28	$75

Tasting Room Philosophy

Table 29
Tasting Room Philosophy by AVA.

Philosophy	Columbia Gorge	S. Oregon	Willamette
We avoid tasting room fees because free tasting can encourage wine sales.	0%	18%	6%
We charge tasting room fees because our wine is of high quality and should not be given away for free.	100%	61%	79%
We charge tasting room fees to manage excess wine consumption.	0%	21%	15%

Table 30
Tasting Room Philosophy by Annual Case Production.

Philosophy	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
We avoid tasting room fees because free tasting can encourage wine sales.	15%	2%	5%	5%	13%
We charge tasting room fees because our wine is of high quality and should not be given away for free.	68%	88%	82%	73%	63%
We charge tasting room fees to manage excess wine consumption.	17%	10%	13%	23%	25%

Ability to Find Competent and Committed Tasting Room Staff

The ability to find competent tasting room staff is reported to be more challenging for the Columbia Gorge AVA tasting rooms than for the others. We believe that it will become increasingly difficult to find competent and committed staff if unemployment rates remain low.

Table 31
Ability to Find Competent and Committed Tasting Room Staff by AVA.

Degree of Ease	Columbia Gorge	S. Oregon	Willamette	North America (Penn, 2016, p. 56)
It is very easy.	0%	9%	4%	4%
It is not that hard.	0%	15%	12%	15%
It is doable with some effort.	64%	49%	56%	52%
It is difficult.	29%	27%	24%	15%
It is impossible.	7%	0%	3%	4%

Note: North American data reflect calendar year 2015 actuals of 800 tasting rooms through the United States and Canada.

Table 32
Ability to Find Competent and Committed Tasting Room Staff by Annual Case Production.

Degree of Ease	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
It is very easy.	9%	0%	5%	0%	10%
It is not that hard.	12%	15%	8%	14%	20%
It is doable with some effort.	50%	56%	64%	64%	40%
It is difficult.	25%	27%	21%	23%	30%
It is impossible.	4%	2%	3%	0%	0%

Starting Hourly Wage for New Tasting Room Staff

Previous research found that the average starting salary in Oregon is $12/hour. This is consistent with our findings with two exceptions: the Willamette Valley AVA and tastings rooms with an annual case production of 1 – 2,500. Both have a higher hourly rate matching the national starting hourly wage of $13/hour for new tasting room staff.

Table 3

Starting Hourly Wage for New Tasting Room Staff by AVA.

Starting Hourly Wage	Minimum	Maximum	Average	Range
Columbia Gorge	$10	$18	$12	$8
S. Oregon	$9	$18	$12	$9
Willamette	$10	$23	$13	$13

Table 34

Starting Hourly Wage for New Tasting Room Staff by Annual Case Production.

Starting Hourly Wage	Minimum	Maximum	Average	Range
1 – 2,500	$9	$23	$13	$14
2,501 – 5,000	$9	$18	$12	$9
5,001 – 10,000	$10	$15	$12	$5
10,001 – 25,000	$10	$17	$12	$7
>25,000	$10	$17	$12	$7

Allowance of Tipping of Tasting Room Staff

The trend of allowing tipping of tasting room staff appears on the rise. Oregon's tipping allowance is markedly different from its North America peers; only 74% of North American tasting rooms permit tipping (Penn, 2016, p. 57).

Table 35
Allowance of Tipping of Tasting Room Staff by AVA.

Tipping Allowed	Columbia Gorge	S. Oregon	Willamette
Yes	93%	93%	79%
No	7%	7%	21%

Table 36
Allowance of Tipping of Tasting Room Staff by Annual Case Production.

Tipping Allowed	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Yes	90%	83%	74%	81%	80%
No	10%	17%	26%	19%	20%

Incentive Compensation for Tasting Room Staff

Incentive compensation widely fluctuates widely by AVA and warrants further investigation. Previous research has found that incentives based on specific goals result in increased sales and wine club membership (Berglund, *Wine Business Monthly*, October 2015). The challenge is ensuring that tasting room staff do not become overbearing in their sales approach, which can achieve the opposite of the intended effect.

Table 37
Incentive Compensation for Tasting Room Staff by AVA.

Incentive Type	Columbia Gorge	S. Oregon	Willamette	North America (Penn, 2016, p. 56)
Commission on wine sales	43%	19%	23%	34%
Payment for new club members	50%	54%	54%	65%
Payment for contact data capture	7%	0%	7%	8%
None	14%	41%	30%	42%

Note: North American data reflect calendar year 2015 actuals of 800 tasting rooms through the United States and Canada.

Table 38
Incentive Compensation for Tasting Room Staff by Annual Case Production.

Incentive Type	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Commission on wine sales	13%	15%	46%	24%	42%
Payment for new club members	31%	64%	69%	76%	84%
Payment for contact data capture	1%	2%	10%	5%	21%
None	47%	25%	15%	19%	16%

With the exception of tasting rooms <2,500 in annual case production, Oregon compares very well to trends in previous research. Oregon meets or exceeds the trend in payment for new club member signups and a higher percentage of our tasting rooms offer some sort of incentive.

Benefits for Tasting Room Staff

Many offered benefits solely to full time employees, while others make a small contribution toward health insurance. Two tasting rooms offer a week of vacation. Sadly, one tasting room said the benefit was “a job.” This sort of attitude will become a problem for hiring in a climate in which Oregon has the lowest unemployment rate since before 1976.

Table 39
Benefits for Tasting Room Staff by AVA.

Benefits	Columbia Gorge	S. Oregon	Willamette
Health	7%	10%	31%
Dental	0%	4%	19%
Vision	0%	4%	17%
Retirement Matching	7%	4%	12%
None	71%	81%	58%

Table 40
Benefits for Tasting Room Staff by Annual Case Production.

Benefits	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Health	2%	26%	50%	30%	65%
Dental	1%	8%	36%	15%	50%
Vision	1%	9%	31%	15%	40%
Retirement Matching	0%	4%	25%	5%	45%
None	88%	57%	44%	30%	20%

Oregon Wine Board Free Events Calendar

The Oregon Wine Board (OWB) offers a number of no-cost marketing opportunities for tasting rooms. The intent is to help "wine country visitors easily identify the wineries that best match their visit objectives" while enticing "prospective visitors by demonstrating the volume and value" of Oregon's diverse tasting room experiences.

The Oregon wine events calendar allows visitors to search for events by date, keyword, and location. Tasting rooms may post winemaker dinners, festivals, celebrations, lectures, and other events to the calendar, at no charge. Research finds show that tasting rooms are not maximizing this opportunity for free events promotions.

Table 41
Oregon Wine Board Free Events Usage by AVA.

Usage	Columbia Gorge	S. Oregon	Willamette
Our tasting room posts some events to the OWB calendar.	43%	42%	47%
Our tasting room is not using the OWB calendar to publicize events.	57%	58%	53%

Table 42
Oregon Wine Board Free Events Usage by Annual Case Production.

Usage	1 – 2,500	2,501 – 5,000	5,001 – 10,000	10,001 – 25,000	>25,000
Our tasting room posts some events to the OWB calendar.	31%	49%	56%	55%	78%
Our tasting room is not using the OWB calendar to publicize events.	69%	51%	44%	45%	22%

Two primary reasons for such low use of the calendar emerged. First, tasting rooms cited a lack of staff. Second, tasting rooms reported that they were unaware of the events calendar, which may also be a function of a lack of marketing staff or contracting out work of this nature.

Tasting room leaders are encouraged to visit the Oregon Wine Board's website. In 2017, the OWB has added listings for every tasting room in Oregon. Each tasting room is encouraged to customize their tasting room listing.

III. Conclusion

Findings from the survey have revealed that continued study, specific to Oregon's tasting rooms and wineries, is warranted. Increased participation by Oregon tasting rooms will allow for the discovery of regional and annual case size differences that are not always apparent otherwise.

Participants were asked to provide the total number of tasting room visitors for 2015, by visitor type: club members, non-club members and trade. A fourth option, "we do not record this information," was also available. It remains unclear if visitors are counted; nearly one fourth of participating tasting rooms did not answer the question. Many appear to have reported percentages while others used rounded numbers (e.g., 500 or 1,000). After talking with many tasting room leaders about this, we concluded that many are not tracking visitors.

This report reflects a compilation of findings of the "Capiche 2016 Survey of Oregon Tasting Rooms." Tasting rooms participating in the study will receive the report of findings in its entirety. Throughout 2017, Capiche will be presenting regional nuances from the report to wine associations throughout Oregon.

IV. References

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