



Colorado Wine Board

Quantitative Wine User Research

Final Report ~ September 10, 2014



Table of Contents

Background & Objectives	p 3
Executive Summary	p 4
Recommendations	p 6
<u>Detailed Findings</u>	p 8
-Total – all wine drinkers	p 9
-Sub groups:	
Weekly vs. monthly wine drinkers	p 28
Gender & age	p 37
Core CO Wine drinkers	p 47

Background & Objectives

Background:

The Colorado Wine Industry Development Board (CWIDB) is interested in tracking Colorado wine consumers' awareness, usage & attitudes toward wine and Colorado wine in particular.

Research was conducted in March, 2014

Research Objectives:

- Identify core wine drinkers & profile their demographics (age, income, consumption behavior).
- Measure incidence levels of Colorado wine drinkers.
- Compare core vs. occasional wine drinkers on key measures for Colorado wine awareness, usage & attitudes.

Methodology:

- Online quantitative test using Survey Monkey research tool.
- Focus RSI wrote the survey questionnaire & CWIDB staff programmed & collected responses.
- Survey Monkey provided respondents via their panel.

Respondent Criteria:

- Male & Females
- Ages 21-70
- Residents of Colorado
- Consume wine 1+/month (also collected Special occasion/ Holiday wine drinkers)
- Ensure/ quota sub-cell of n=100 1+/week wine drinkers.

Executive Summary

Key Insights:

Wine drinkers are aware of Colorado wine & the majority have tried Colorado wines:

But these wine drinkers are not consuming CO wine on a regular basis.

- 84% are aware of CO wine & 74% have consumed / tried CO wine.
- Only 5% state they purchase CO wine monthly & none on a weekly basis.

Even though many don't buy CO wine frequently, future purchase interest for CO wine is good:

50% purchase CO wine less than once a year, or not at all.

- However, 55% are interested in purchasing CO wine in the future – showing upside potential.

Perceptions of quality for CO wine is lower vs. California & Europe:

However, wine drinkers believe CO wine is improving in quality.

- 37% of wine drinkers associate above average quality with CO wines, 71% for California wines & 69% for Europe wines. (slide 21)
- This holds true among all sub groups - even Core CO wine purchasers.

They are not spending a lot per bottle.

79% spend less than \$15 per bottle.

- CO wine is on par with California wine in terms of price they expect to pay among all wine drinkers.
- Interestingly, among Core Colorado wine drinkers, price expected for CO wine is higher than California wines, where more people expect to pay \$9-\$12 per bottle for California wines vs. Colorado wines. (slide 53)

They don't know what to expect from CO wine:

California and European wines set clear expectations of taste characteristics.

- A significantly lower number of wine drinkers associate characteristics with Colorado wines. (slide 20)
- As a result, a fewer percent of wine drinkers associate Colorado wine with typical wine occasions (slide 17)

Key Insights:

They don't know much about Colorado wine growing regions - 50% have never heard of regions.

Further, knowledge of wine regions is not a driver when selecting brands of wine. More important in terms of wine selection drivers is price, style of wine, friend recommendation & the ability to taste the wine before buying it. (slide 26)

- Wine drinkers do state interest in local growers and wine tasting events, however, the Colorado growers and wine regions angle alone does not communicate why to buy Colorado wine.

Distribution in on premise accounts for CO wines may be a barrier to consumption.

Trial / Sampling are key for Colorado wines in bars & restaurants.

- Buying a glass is less risky vs. a bottle when trying a new wine.
- However, significantly fewer wine drinkers purchased CO wine from bars & restaurants vs. wine in general. Said another way – they purchase wine in these locations – but not CO wine. (slide 15)

Among sub groups, Occasional and Holiday consumers are less apt to purchase & consume CO wine.

67% have either “never purchased” or have done so less than once a year.

- Likely these occasional wine drinkers are purchasing and consuming popular, mainstream wine brands.

Those who like to experiment, tasting new wines are more apt to purchase Colorado wines.

69% of Core Colorado wine purchasers state they like to experiment (slide 57)

- Core CO wine purchasers buy wine monthly or more frequently & have purchased CO wine weekly to several times per year. (see slide 47 for profile on this key target consumer).

Primary competition to CO wine is California wine.

Core Colorado wine purchasers are also interested in purchasing California wine.

- They see California wine as higher quality vs. Colorado wine.
- Core CO wine drinkers also view CO wine as slightly more expensive – thus, a lesser value.
- They do not associate benefits and characteristics with drinking CO wine.

Recommendations

Recommendations

Define taste expectations of Colorado wine.

- Wine drinkers do not know what CO wine tastes like; how it's different vs. other wines.
- They don't understand why it tastes better vs. California wines.
- They see California wines as higher in quality vs. Colorado wines – yet priced cheaper.
- Wine drinkers are VERY interested in value.
- Thus – California wines are a natural choice for most occasions.

Turn Colorado wine into a benefit to consumers – why is it better?

- Just as Napa Valley or Sonoma are known for certain characteristics, so could Colorado wines.
- Educate consumers on unique characteristics of Colorado wines vs. California wines.
- Educate consumers on a specific style of wine (or grape) that only Colorado can produce the best – better than California, the primary competition.
- Turn the local CO wine angle into a consumer benefit that is relevant to wine drinkers based on their perceptions (which may not always be accurate – as in, “the sulfites give me headaches”).
 - Fresher tasting – less shipping time
 - Less tannins; preservatives, sulfites, tyramine (these may be current perceptions among consumers to leverage)
 - Less headaches due to soil conditions, purer ingredients (yeasts)

Define usage occasions for Colorado wine.

- Colorado wines are currently not a strong fit for multiple wine occasions.
- Educate wine consumers when to drink CO wine – food pairings, certain occasions and why it's a better fit for these occasions vs. competitive wines.

Target “Core” monthly wine consumers that are experimental by nature & who have purchased CO wine in the past:

- Increase distribution in bars, restaurants & all on premise accounts. There should be at least one CO wine on the drink list – just as there are local beers on the beer list.
- Where possible, host tastings and wine events – at retail – not at wineries, which are far removed from most core wine drinkers.

Detailed Findings

Among total sample of wine drinkers

Who are wine drinkers?:

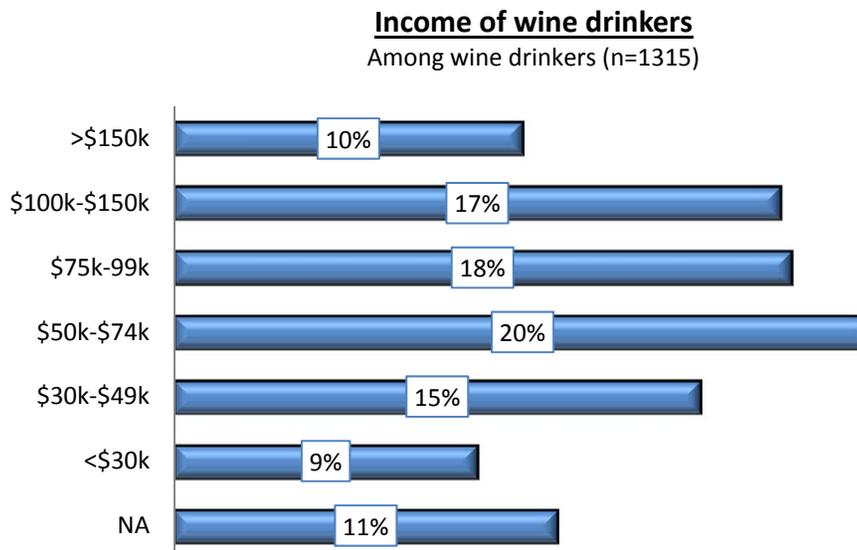
Penetration:

- Of all the people entering the survey, 64% indicate they drink wine in the past month.
- Spirits are consumed among 51% of respondents entering the survey & beer among 48%.

Past month consumption – among all entering survey	% total entering the survey (prior to screening for wine drinkers, n=1870)
Wine	64%
Beer	48%
Spirits/Mixed drinks (whiskey, vodka, rum, gin, tequila, etc.)	51%

Income of wine drinkers:

- 45% of wine drinkers earn \$75,000+ in annual household income.



Q.4 Which of the following alcoholic beverages have you consumed in the past month? Please check all that apply.
Q. 7 What range does your annual household income fall into?

Age & Gender of wine drinkers:

Age

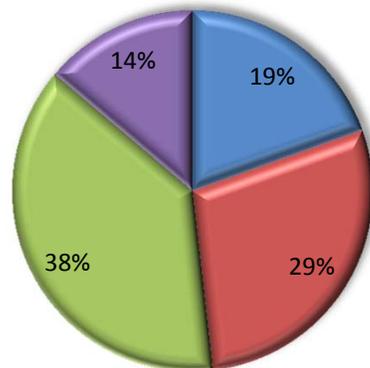
- 52% of respondents that consume wine are 51+.
- Wine consumption is fairly represented by age; 19% are ages 21-35.

Gender

- 78% of wine drinkers were female – note that this does not necessarily reflect wine consumption by gender, rather response rates among panel respondents.

Age of Respondents

(Total wine drinkers, n=1315)

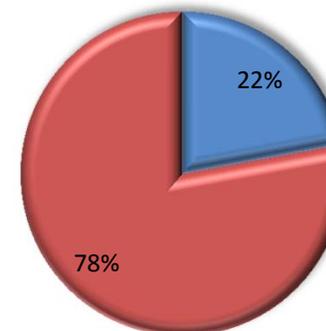


- 21-35
- 36-50
- 51-65
- 66+

Gender

(Total wine drinkers, n=1315)

■ Male ■ Female



Q.1 What is your gender?

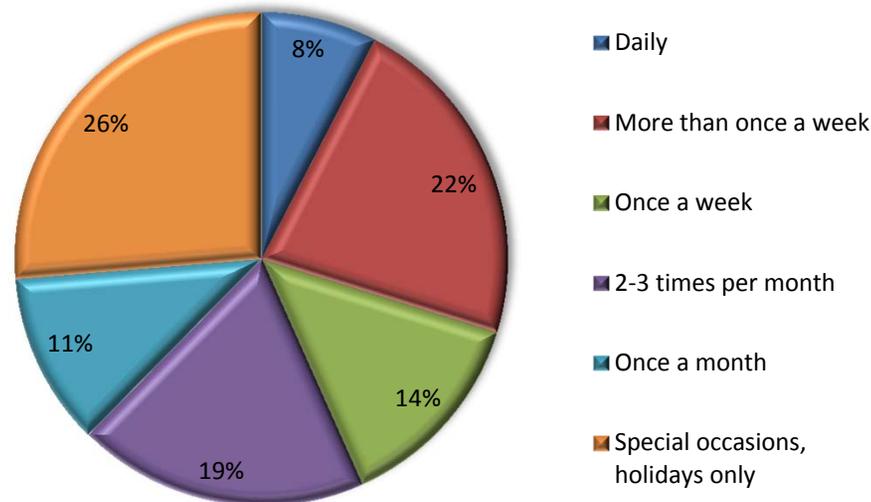
Q.2 In which range does your age fall?

Frequency of wine consumption:

- 43% consume wine weekly or more frequently.
- 30% consume wine 1-3 times per month.
- 26% of wine drinkers consume wine on an occasional basis – holidays & special occasions only.

17% were screened out of the survey as never drinking wine.

Frequency of Wine Consumption
(Total wine drinkers; n=1315)



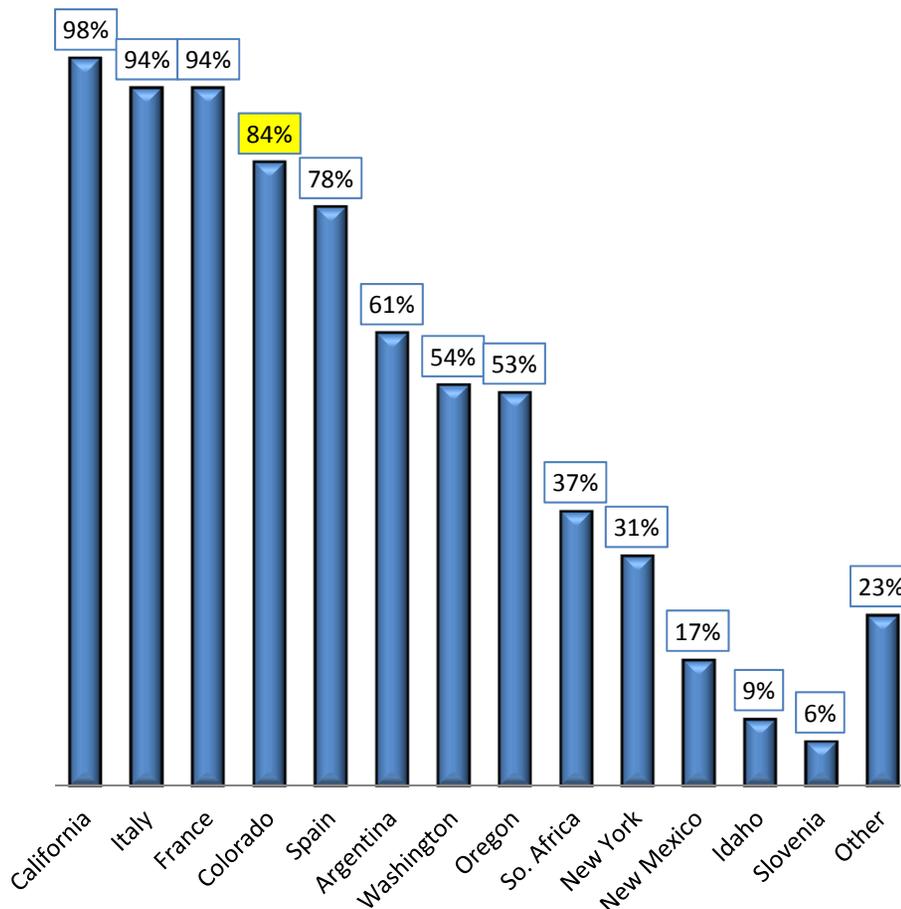
Q.5 On average, how often do you drink wine?
Note: Total sample = wine drinkers

Awareness of CO wine production is high:

- 84% of wine drinkers know wine is produced in Colorado. 98% know wine is produced in California.
- When asked what geographic areas come to mind when thinking about wine production, California, Italy, Australia and Colorado rise to the top.

Where heard of wine produced (aided list)

(n=1315)



Areas come to mind - open end

Word Cloud - most mentioned in larger text



Other (23%) - open ends

Chile	18.58%
Germany	17.91%
New Zealand	11.49%
Portugal	3.72%
Missouri	2.70%
Michigan	2.36%
Virginia	2.03%
Australia	2.03%
Chili	2.03%
Nebraska	2.03%
Indiana	2.03%

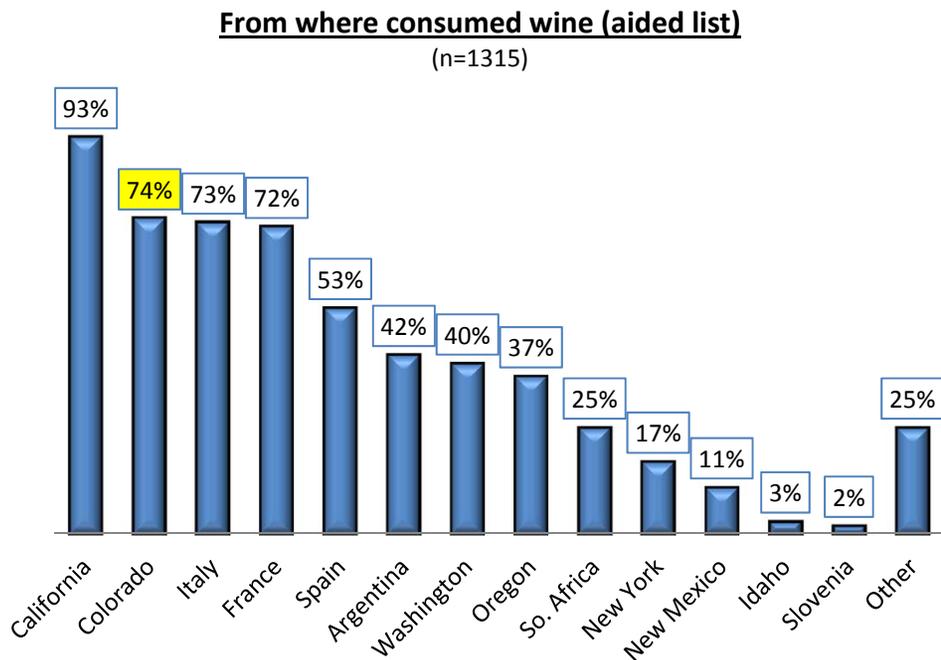
- Q. 8 What geographic areas come to mind when thinking about where wine is produced? Write in.
 Q. 9 From which of the following geographic areas have you ever heard of wine being produced?

Penetration of CO wine consumption is 74%:

- 74% of wine drinkers residing in Colorado have consumed Colorado wine. Note that this is not a frequency of consumption by region, rather incidence of ever consuming CO wine (refer to slide 18 for frequency).
- Said another way, this means 26%* have never consumed CO. wine.
- Beyond Colorado, California and European wines rise to the top in terms of consumption.
- Under other – open end word cloud show frequent mentions of Australia, Germany, Chile, Greece.

Word Cloud Other (25%) – open ends

Arizona Australia **Australia** Chile Chili
 Germany Greece Indiana Iowa Mexico Michigan
 Missouri Nebraska New Zeland Portugal
 South Dakota Virginia



Q. 10 From which of the following geographic areas have you consumed wine? Check all that apply.

*Note –Q. 16 indicates 22% have never **purchased** CO wine. And data from Q. 25 indicate that 37% have never **consumed** or **purchased** CO wine.

Wine purchase location - wine in general vs. CO wine:

- Restaurants show a large % difference between where people buy wine in general vs. where they buy CO wine.
- 68% purchase wine in restaurants, however, only 46% purchase CO wine in restaurants. This could be due to a lack of distribution of CO wines in restaurants.
- Large gaps (indicated in red boxes) also exist in bars, large volume discount & neighborhood liquor stores.

% people buying wine at each location	CO wine (n=833, CO wine purchasers)	Wine in general (n=1513, total sample)
Neighborhood liquor store	72%	91%
Wine specialty shop	42%	53%
Large, volume discount liquor store	46%	68%
Grocery store that sells wine	33%	51%
Restaurants	46%	73%
Bars	34%	54%
Farmer's markets	36%	44%
Winery or wine tasting room	51%	51%
Internet	30%	43%
Wine Club (on-line, from a winery or mail-order)	32%	46%
Other (e.g. sports/concert venue or wine festival)	30%	39%

Q. 11 Approximately what percent of all the wine you bought during the past year, or so, came from the following retail locations? It's OK to enter 0 if you have not purchased wine from a particular location. YOUR ANSWERS MUST TOTAL TO 100%.

Q. 26 What percent of all the Colorado wine you bought, during the last year or so, was from the following locations? It's OK to enter 0 if you have not purchased wine from a particular location. Again, please give us a quick estimate from memory. YOUR ANSWERS MUST TOTAL TO 100%.

Note: Data adjusted to % population. Survey Monkey did not tally to 100%; thus actual share numbers are incorrect in Survey Monkey data output for these two questions.

Slide 15

DC1

IT is interesting that 44% of wine in general reported purchased from farmers markets, when only CO wine is available at farmers markets. Yet only 31% of CO wine is reported as coming from farmers markets.

There is either a glitch in the question or the calculation due to the note at the bottom.

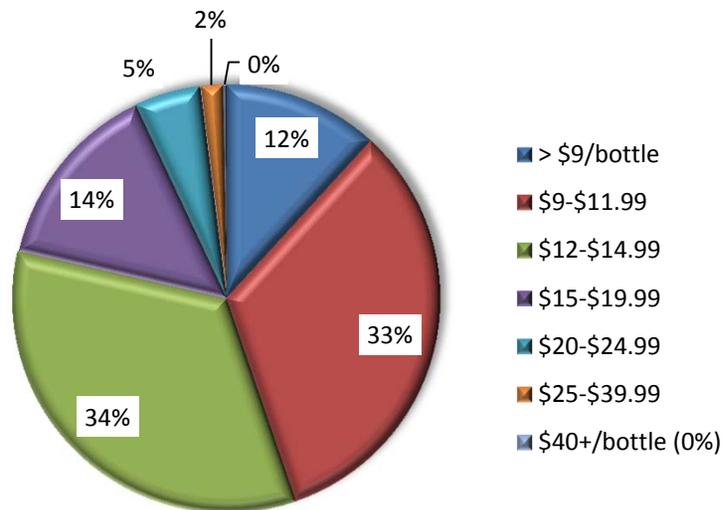
Doug Caskey, 9/10/2014

79% spend under \$15/ bottle:

- 34% of wine drinkers typically spend \$12-\$14.99 on a bottle of wine.
- 45% typically spend less than \$12 per bottle.
- Most (58%) don't shop for wine in a winery. However, 42% of respondents do and 26% of respondents pay "somewhat more" for wine from a winery shop.

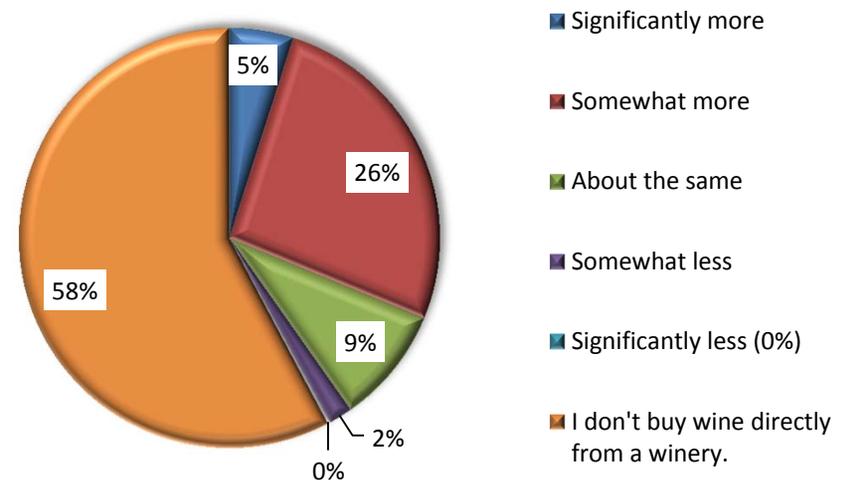
% People spending \$ on bottle of wine

(n=1315)



Winery spending behavior

(n=1315)



Q. 13 How much do you typically spend on a standard (750 ml) bottle of wine at a liquor store, a grocery store, or a specialty wine shop?

Q. 14 If you buy wine directly from a winery (in person or via a winery's website), do you typically spend more or less than you do at a liquor store or wine shop?

Slide 16

DC2

Strategy thought: if we can't meet their price point or upsell them on CO wines, how do we target the \$15 and above consumer?

Doug Caskey, 9/10/2014

Occasions for wine & for Colorado wine:

- Respondents participate in a wide variety of wine occasions.
- 86% say they drink / purchase wine for holidays or special occasions. For this same occasion, only 63% say Colorado wine is a "fit."
- Occasions that best fit CO wine include friend's house, gift, entertaining guests and holiday meal or special occasions.
- CO wine is more of a "fit" vs. wine in general for outdoor picnics & a gift to a co-worker/casual friend.

Where consume wine vs. fit for CO wine

(% wine drinkers)

■ Wine Occasion consumed or purchased (n=1315)

■ Co Wine Occasion Fits n=833



Q. 15 In which of the following situations have you consumed or purchased wine over the last year or so? Check all that apply.

Q. 28 For which of the following situations or occasions does Colorado wine fit in your opinion? Check all that apply.

Slide 17

DC3

CO is strongest as a gift or shared over a meal, especially outside meals. But not strong when shared for the holidays.

Is sharing the secret of CO wines the hook?

Doug Caskey, 9/10/2014

Frequency of wine purchased by region:

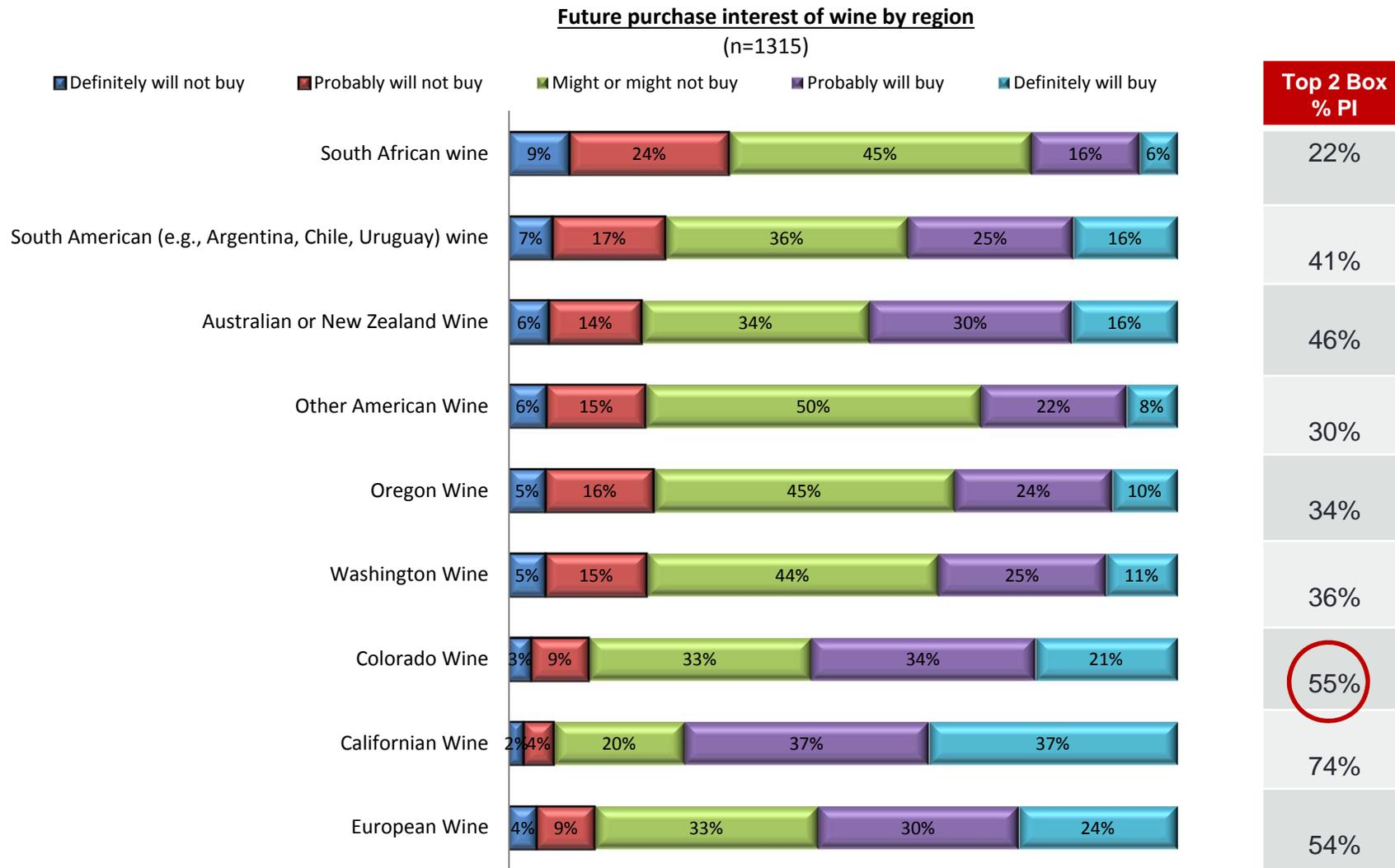
- California wine is consumed monthly by 22% of wine drinkers, while Colorado wine by only 5% of wine drinkers. This is the gap to close.
- 22% say they have never purchased CO wine. This is another gap number to lower between now and the next tracking study.
- 28% say they purchase CO wine less than once per year – very infrequent.
- Only 5% state they purchase CO wine monthly & none on a weekly basis.

% wine drinkers	Have never purchased	Less than once a year	Around once a year	A few times a year	Monthly	Weekly
European Wine	16%	23%	14%	36%	10%	1%
Californian Wine	5%	13%	15%	40%	22%	5%
Colorado Wine	22%	28%	18%	27%	5%	0%
Washington Wine	49%	21%	12%	15%	3%	0%
Oregon Wine	52%	22%	11%	12%	3%	0%
Other American Wine	34%	32%	15%	16%	3%	0%
Australian or New Zealand Wine	33%	18%	15%	25%	8%	1%
South American (e.g., Argentina, Chile, Uruguay) wine	41%	17%	13%	22%	7%	1%
South African wine	65%	16%	9%	9%	1%	0%

Q. 16 How often do you typically purchase wine from each of the following geographic areas?

Future Purchase Interest:

- 55% of respondents are interested in purchasing CO. wine in the future.
- This is on par with European wine and shows upside potential for CO wine sales.



Q. 17 In the future, how interested are you in purchasing wine from each of the following geographic areas?

Slide 19

DC4

If they have an interest in CO wine, what is keeping them from buying it?

Doug Caskey, 9/10/2014

Wine characteristics by region:

- CO wine is expected to deliver slightly sweet or fruity characteristics by 23% of respondents as is California wine (green boxes). Notably, expectations of CO wine are low among respondents – most respondents did not assign characteristics to CO wine.
- California wine has a variety of expectations of taste characteristics – showing consumers are familiar with its diversity of flavors.
- European wine is expected by respondents to be complex and structured & sweet.

Among total wine drinkers (n=1315)	European wine	Californian wine	Colorado wine	N/A
Dry, crisp and clean	22%	34%	9%	36%
Slightly sweet or fruity	14%	32%	23%	31%
Very sweet dessert wine	30%	16%	11%	43%
Rich, oaky or full-bodied	22%	35%	7%	36%
Smooth, berry or velvety	17%	31%	14%	37%
Dry and tannic, but well-balanced	28%	22%	8%	42%
Complex and structured	38%	15%	4%	44%
Earthy	18%	21%	18%	43%
Food-friendly	17%	37%	13%	33%

Q. 18 Certain varieties and characteristics of wine may appeal to you more than others. If you were looking for the wine characteristics listed below, what one region would you most expect to deliver these characteristics? Check one per row. If you are unfamiliar with these regions or characteristics, have no opinion or just don't know, please select N/A

Impressions of quality by region:

- 71% of wine drinkers believe California wine has high or above average quality; 69% for European wine.
- Only 37% believe Colorado wine has above average/ very high quality – indicating quality perceptions of Colorado wine vs. California and Europe is an issue.

Quality impressions Among total wine drinkers (n=1315)	Very poor quality	Below average quality	Average quality	Above average quality	Very high quality	N/A
European wine	0%	0%	11%	34%	35%	19%
California wine	0%	1%	15%	41%	30%	12%
Colorado wine	1%	7%	28%	27%	10%	26%

- 41% of wine drinkers believe Colorado wine is somewhat or significantly improving in quality.
- 53% believe European wine is staying the same in terms of quality.
- California wine is believed to be the same and improving among respondents – a positive outlook.
- Very few believe any wines are declining in quality.

Changes in quality Among total wine drinkers (n=1315)	Quality significantly declining	Quality somewhat declining	Quality staying about the same	Quality somewhat improving	Quality significantly improving	N/A
European wine	0%	4%	53%	7%	4%	32%
Californian wine	0%	2%	39%	22%	10%	26%
Colorado wine	0%	1%	19%	27%	14%	39%

Q. 19 Select the statement that best describes your opinion and impression regarding the quality of wines from each of the following geographic areas. Check one in each row. If you have never tried wine from a particular region or have no opinion, please select N/A.

Q. 20 Select the statement that best describes your opinion and impression of the change in quality of wines over time from each of the following geographic areas. Check one in each row. If you have never tried wine from a particular region or have no opinion, please select N/A.

Slide 21

DC5

N/A for CO wine is higher than CA or Euro. So either people were fudging when they answered about awareness of CO wine, or they have no experience/impression of CO wine.

Is this another possible hook, calling for people to experience CO?

Doug Caskey, 9/10/2014

Value & price expectation by region:

- 48% of wine drinkers believe European wine is somewhat or significantly over priced.
- 61% believe California is fairly priced; 45% for Colorado wine.
- Both California and Colorado wines are perceived to be somewhat / significantly overpriced by 17% - 19% of respondents.

Total wine drinkers (n=1315)	Significantly underpriced (great bargain)	Somewhat underpriced	Fairly priced	Somewhat overpriced	Significantly overpriced (too expensive)	N/A
European wine	1%	1%	28%	41%	7%	22%
Californian wine	0%	1%	61%	19%	2%	16%
Colorado wine	1%	2%	45%	17%	3%	33%

- Pricing of Colorado and California wines are expected to range from \$9-\$14.99 for most wine drinkers.
- European wines are expected to cost more; \$15-\$25 per bottle, by most people.

Total wine drinkers	Less than \$9 per bottle	\$9 - \$11.99 per bottle	\$12 - \$14.99 per bottle	\$15 - \$19.99 per bottle	\$20 - \$24.99 per bottle	\$25 - \$39.99 per bottle	\$40 or more per bottle	N/A
European wine	2%	9%	20%	24%	17%	8%	3%	18%
California wine	6%	21%	30%	20%	8%	2%	0%	12%
Colorado wine	5%	17%	25%	20%	6%	1%	0%	26%

Q. 21 Select the statement that best describes your opinion and impression regarding the pricing for the quality of wines from each of the following geographic areas. Check one in each row. If you have never tried wine from a particular region or have no opinion, please select N/A. Check one in each row.

Q. 22 What do you expect to spend at a wine shop or liquor store for a typical bottle (750 ml) of wine from each of the following geographic areas? Think about the average price for each region. Check one in each row. If you have never purchased wine from a particular region or have no expectations about the price, please select N/A.

Slide 22

DC6

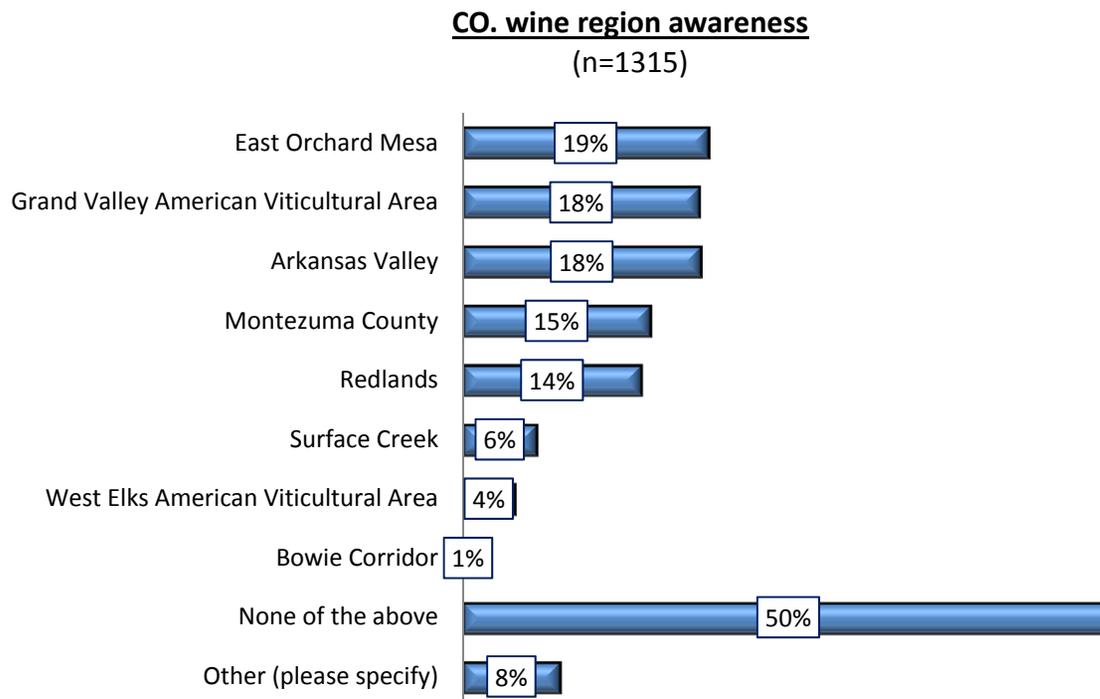
Image problem here: do people expect us to be cheaper due to proximity and lower shipping costs or because of lower quality?

We may not want to compare ourselves, but this is a place where we might benefit from comparison.

Doug Caskey, 9/10/2014

Awareness of Colorado wine regions:

- 50% of wine drinkers in Colorado are not aware of wine growing regions in the state.
- East Orchard Mesa, Grand Valley & the Arkansas Valley are known the by the most number of wine drinkers.



Q. 23 Which of the following Colorado wine regions have you heard of or seen on a wine label? Check all that you have heard of.

Slide 23

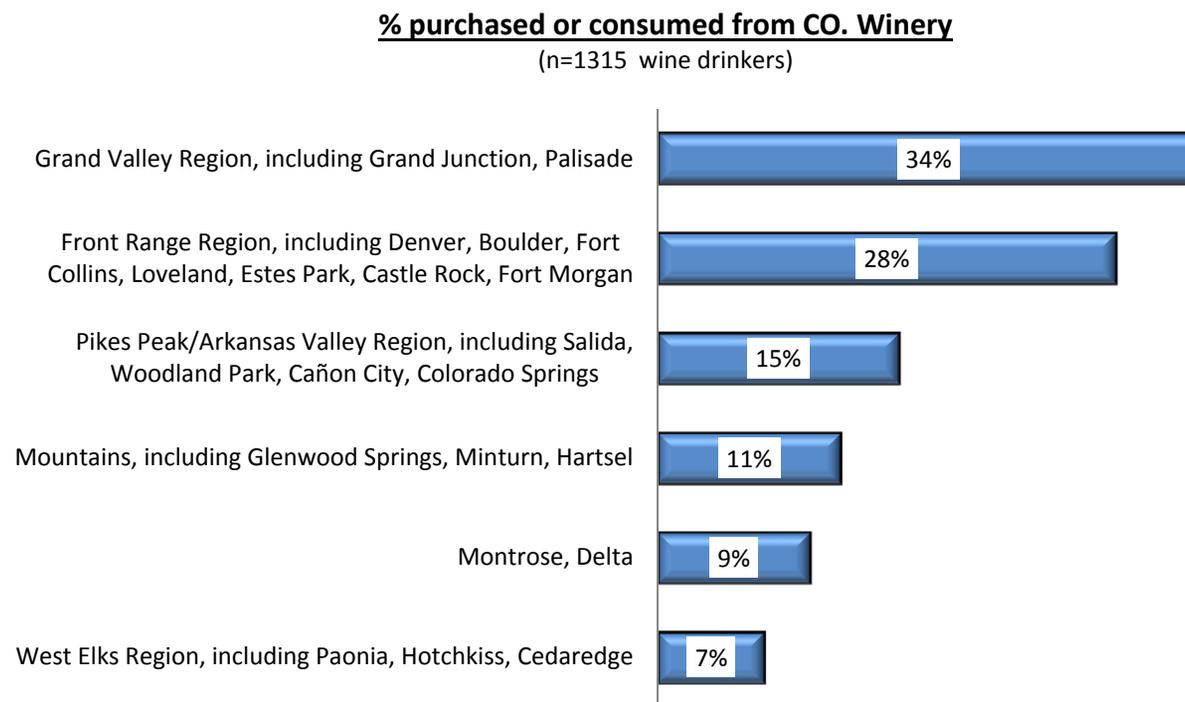
DC7

And only 1% fell for the fake "Bowie Corridor"

Doug Caskey, 9/10/2014

Purchased or consumed by Colorado wine regions:

- 34% of wine drinkers that have consumed CO wines indicate they have purchased or consumed CO wine from a winery or tasting room in the Grand Valley Region, followed by 28% from the Front Range region.



37% indicated they have not purchased or consumed CO wine in a winery or tasting room.

Q. 25 If you have purchased or consumed Colorado wine from a Winery or wine tasting room, check all the geographic areas from which you have purchased or consumed Colorado wine at a winery or wine tasting room. If you have never purchased or consumed Colorado wine, PLEASE SELECT ONLY "I HAVE NEVER PURCHASED OR CONSUMED...."

Opinions of Colorado wines:

- The majority of respondents agree they like to “support local growers,” “have interest in visiting CO wineries,” and are “interested in CO wine events.”
- There is some perception that Colorado wines are NOT higher priced vs. California wines and are NOT higher quality vs. California wines.
- Many have no opinions regarding several statements (very high % numbers) – pesticides, antioxidants, cooler nights/hotter days – likely due to a lack of education.

Among total wine drinkers (n=1315)	Strongly disagree–	Somewhat disagree	Neutral	Somewhat agree	Strongly agree	No opinion
Colorado wines are fresher than other wines	2%	5%	39%	14%	4%	36%
I cannot find Colorado wines in stores	20%	23%	12%	16%	3%	26%
I like to buy Colorado and support local growers	2%	3%	14%	28%	33%	19%
I don't think about Colorado wines as locally grown	30%	23%	13%	9%	4%	21%
Colorado wines are more expensive vs. California wines	9%	20%	23%	16%	4%	29%
Colorado wines are higher quality vs. California wines	7%	22%	34%	7%	2%	28%
Colorado wines have fewer pesticides vs. other wines	2%	6%	38%	7%	3%	46%
I am interested in visiting Colorado wineries	4%	5%	13%	32%	28%	17%
I am interested in Colorado wine tasting events	5%	6%	15%	29%	27%	18%
High-elevation wines have a greater concentration of antioxidants that may prevent some diseases	1%	2%	33%	8%	3%	52%
Wines in Colorado are exposed to cooler nights and hotter days resulting in higher quality grapes	1%	3%	30%	18%	6%	42%

Q. 24 What are your opinions and impressions of Colorado wines even if you have never tasted any?

Slide 25

DC9

Opportunity to elevate the impression of CO wine with more education about the advantages of lower pesticides, higher-elevation and cooler nights.

Doug Caskey, 9/10/2014

Factors in buying Colorado wine:

- Pricing is a key driver when respondents are considering Colorado wine. They also want to taste it or see descriptions of taste.
- Style of wine & a friend's recommendation are also selection drivers for many wine drinkers.
- Region wine comes from - is important only to 23% - much lower than other factors.

Among total wine drinkers (n=1315)	Important	Neither important nor unimportant	Unimportant	N/A
Fair price for quality of wine	79%	9%	2%	9%
Style of wine (red, white, rose, blend, fruit, plant)	77%	10%	3%	10%
Friend's recommendation	70%	17%	4%	9%
Chance to taste the wine before buying it	65%	19%	5%	10%
Description of wine flavor on label	60%	23%	6%	11%
Store, restaurant, staff recommendation	55%	26%	8%	11%
Must be priced under a certain amount	54%	29%	7%	10%
Experiment –want to try a new wine I have not tasted before	53%	28%	7%	12%
Information displayed about the wine	53%	28%	7%	12%
Discounted price / on sale	45%	36%	8%	11%
A wine I am familiar with in the past	41%	34%	12%	13%
Won wine awards or medals	34%	38%	15%	13%
Food / menu pairing	36%	36%	16%	13%
Points rated	34%	33%	15%	18%
Attractive label design	29%	44%	16%	12%
Magazine / newspaper review or article	26%	39%	21%	14%
Region that the wine is from	23%	45%	18%	14%
History / heritage of winery	21%	48%	17%	14%
Well-known winery name / brand name	20%	44%	22%	14%
Eye catching wine display	20%	43%	22%	15%
Internet – bloggers, social media recommendations, reviews	16%	36%	32%	17%

Q. 29 If you buy Colorado wine in the future, which factors will be most important when deciding what Colorado wine to buy? Please rate each factor. Use N/A if you don't care about a factor or have no opinion.

Advice from wine consumers:

- Survey Monkey does not have an advanced tool for open ends. Refer to excel spreadsheet, separate from this report for actual verbatims.

Advertise Advice Exposure Flavor Good Work Grapes Hard
 Idea Known Label Liquor Stores Local
 Marketing Organic Price Product Promote
 Quality Restaurants Samples Social Media
 Tasting Think Wine Word

Wine		28.37%
Tasting		16.35%
Advertise		11.94%
Local		10.42%
Liquor Stores		6.08%
Price		6.01%
Marketing		4.94%
Restaurants		4.87%
Samples		3.35%
Quality		2.66%
Think		2.13%

Q 30 - example of verbatims - refer to excel spreadsheet - separate from report

Restaurant availability, with informed sommeliers for tasting/pairing

Availability in local liquor stores, promote supporting local business and the impact of supporting local businesses

Opportunities to taste and experience these wines e.g. served as a house wine in favorite restaurants, offered at events, reviews in local publications.

I look for cool labels. Especially because I give bottles as gifts a good bit.

Get it in stores other than high end specialty stores!

Advertising to increase familiarity

Since Colorado isn't well known for our vineyards- make sure to advertise appropriately!

Should be fairly priced.

Wine tours/tastings

better placement in restaurants

Get it into the stores.

I don't recall ever seeing advertising for Colorado wines on the internet. Perhaps that would help.

Advertise more locally

Tourist bureau in winery location

offer special tour prices

More advertising away from winery, more wine parties.

store tasting events

It would be great if it would be featured in restaurants I frequent with food pairings.

Produce fine red wines

keep marketing

just keep making more wine

Advertise the health benefits and quality if that is true

Q. 30 What other advice do you have for Colorado wine producers to get people like you to buy and drink more Colorado wine?

Data breaks by sub groups

Frequency of wine consumption

Income by wine consumption frequency:

- Seemingly, the more wealthy the individual, the more frequently he/she buys wine; 33% of wine drinkers buy on a weekly basis and are \$100k+ in household income.

Income by wine consumption frequency	Total wine drinkers (n=1315)	Special Occasion / Holiday (n=346)	1-3 times per month (n=400)	Weekly + (n=569)
<\$30k	9%	12%	10%	6%
\$30k-\$49k	15%	17%	17%	13%
\$50k-\$74k	20%	18%	20%	21%
\$75k-99k	18%	19%	18%	17%
\$100k-\$150k	17%	13%	17%	20%
>\$150k	10%	7%	9%	13%

Q. 7 What range does your annual household income fall into?

Note: Data splits for this section of the report are based on Q. 5 On average, how often do you drink wine?

Awareness & consumption of CO wine production is highest among frequent wine drinkers:

- 90% of weekly to daily wine drinkers are aware of CO wine.
- Less frequent wine drinkers are less aware of CO wine.
- 82% of weekly to daily wine drinkers have consumed CO wine.

AWARENESS	Total	Special Occasion / Holiday	1-3 times per month	Weekly +
California	98%	97%	98%	98%
Oregon	53%	37%	51%	65%
Colorado	84%	75%	81%	90%
New York	31%	24%	27%	37%
Idaho	9%	9%	6%	10%
New Mexico	17%	14%	15%	21%
Washington	54%	36%	49%	68%
Argentina	61%	35%	60%	77%
Spain	78%	65%	77%	87%
France	94%	91%	94%	96%
Italy	94%	90%	95%	96%
Slovenia	6%	6%	5%	6%
South Africa	37%	19%	34%	50%

Q. 9 From which of the following geographic areas have you ever heard of wine being produced?

CONSUMPTION	Total	Special Occasion / Holiday	1-3 times per month	Weekly +
California	93%	97%	95%	96%
Oregon	37%	37%	33%	50%
Colorado	74%	75%	73%	82%
New York	17%	24%	17%	21%
Idaho	3%	9%	2%	4%
New Mexico	11%	14%	9%	16%
Washington	40%	36%	35%	56%
Argentina	42%	35%	39%	60%
Spain	53%	65%	51%	70%
France	72%	91%	70%	83%
Italy	73%	90%	75%	85%
Slovenia	2%	6%	2%	3%
South Africa	25%	19%	24%	37%

Q. 10 From which of the following geographic areas have you consumed wine? Check all that apply.

Frequency of CO wine purchase:

- Colorado wine purchases are “a few times a year” for most wine drinkers, regardless of how frequently they purchase wine.
- More special occasion/holiday wine purchasers have never purchased CO wine.

Colorado Wine by wine consumption frequency	Never Purchased	Less than once a year	Around once a year	A few times a year	Monthly	Weekly
TOTAL Wine drinkers	22%	28%	18%	27%	5%	0%
Special occasions / Holiday	31%	36%	17%	16%	0%	0%
1-3 times/ month	23%	27%	19%	29%	3%	0%
Daily - Weekly	16%	25%	18%	33%	8%	0%

- Future Purchase Interest in CO wines is highest among more frequent drinkers.
- Versus California wines, CO wines do not rate as high on future Purchase Intent.

Future Purchase Intent MEANS (5 pt. scale)	Total	Special Occasion / Holiday	1-3 times per month	Weekly +
European Wine	3.60	2.99	3.64	3.95
Californian Wine	4.02	3.41	4.00	4.40
Colorado Wine	3.61	3.29	3.69	3.75
Washington Wine	3.20	2.72	3.19	3.51
Oregon Wine	3.16	2.70	3.18	3.42
Other American Wine	3.11	2.74	3.11	3.33
Australian or New Zealand Wine	3.36	2.71	3.38	3.74
South American (e.g., Argentina, Chile, Uruguay) wine	3.26	2.60	3.20	3.71
South African wine	2.85	2.44	2.86	3.10

Q. 16 How often do you typically purchase wine from each of the following geographic areas? Check one.

Q. 17 In the future, how interested are you in purchasing wine from each of the following geographic areas?

Quality & price impressions by drinker frequency:

- Colorado wine is perceived to be lesser quality by all types of wine drinkers, regardless of how frequently they consume wine.
- Note: 3.00 is an average rating on a 5 pt. scale. 4.00 is above average and 2.00 is below average.*

Quality impressions by drinker frequency MEAN (5pt. Scale)	Total	Special Occasion / Holiday	1-3 times per month	Weekly +
European Wine	4.28	4.21	4.26	4.31
California Wine	4.15	4.07	4.06	4.24
Colorado Wine	3.52	3.73	3.47	3.46

- Colorado wine quality is perceived as more fairly priced (close to 3.00 MEAN ratings) among special occasion and monthly drinkers. However, more weekly/daily wine drinkers perceive CO wine to be slightly over priced vs. European & California wines.

Value by user type MEAN (5 pt. scale) 1=underpriced 5= overpriced	Total	Special Occasion / Holiday	1-3 times per month	Weekly +
European Wine	3.70	3.68	3.73	3.68
California Wine	3.25	3.21	3.29	3.24
Colorado Wine	3.28	3.13	3.19	3.40

Q. 19 Select the statement that best describes your opinion and impression regarding the quality of wines from each of the following geographic areas. Check one in each row. If you have never tried wine from a particular region or have no opinion, please select N/A.

Q. 21 Select the statement that best describes your opinion and impression regarding the pricing for the quality of wines from each of the following geographic areas. Check one in each row. 1=significantly underpriced (great bargain) to 5 = significantly overpriced (too expensive); 3= fairly priced.

Opinions & impressions of CO wines by drinker frequency:

- There's no difference in the opinions and impressions of Colorado wine by frequency of wine drinker.
- Local / Colorado wines are of interest.

Opinions and Impressions of Colorado Wines MEAN (5 pt. scale) 1= strongly disagree to 5 = strongly agree	Total	Special Occasion/ holiday	1-3/monthly	Weekly+
Colorado wines are fresher than other wines	3.18	3.33	3.16	3.13
I cannot find Colorado wines in stores	2.47	2.33	2.40	2.57
I like to buy Colorado and support local growers	4.08	4.21	4.06	4.04
I don't think about Colorado wines as locally grown	2.15	2.06	2.10	2.22
Colorado wines are more expensive vs. California wines	2.82	2.61	2.67	2.99
Colorado wines are higher quality vs. California wines	2.66	2.90	2.69	2.55
Colorado wines have fewer pesticides vs. other wines	3.05	3.10	3.05	3.03
I am interested in visiting Colorado wineries	3.92	3.65	3.95	4.03
I am interested in Colorado wine tasting events	3.81	3.45	3.81	3.98
High-elevation wines have a greater concentration of antioxidants that may prevent some diseases	3.18	3.20	3.29	3.10
Wines in Colorado are exposed to cooler nights and hotter days resulting in higher quality grapes	3.45	3.51	3.49	3.40

Q. 24 What are your opinions and impressions of Colorado wines even if you have never tasted any?

Where purchase CO wine by frequency drinker group:

- Most CO wine is purchased in a neighborhood liquor store, regardless of the wine drinker frequency sub group.
- Special Occasion / Holiday wine drinkers tend to purchase CO wine less vs. more frequent drinkers in wine specialty shops, grocery stores, restaurants and bars.

% people buying CO wine at each location	Total CO Wine drinkers (n=833)	Special Occasion/ Holiday CO Wine drinkers (n=170)	1-3 / mo. CO wine drinkers (n=256)	Weekly CO wine drinkers (n=407)
Neighborhood liquor store	72%	74%	73%	71%
Wine specialty shop	42%	34%	43%	44%
Large, volume discount liquor store	46%	42%	47%	47%
Grocery store that sells wine	33%	28%	36%	34%
Restaurants	46%	37%	50%	47%
Bars	34%	29%	37%	35%
Farmer's markets	36%	33%	39%	35%
Winery or wine tasting room	51%	39%	47%	58%
Internet	30%	27%	32%	31%
Wine Club (on-line, from a winery or mail-order)	32%	27%	33%	33%
Other (e.g. sports/concert venue or wine festival) Specify below	30%	31%	32%	28%

Q 26 Where buy Colorado Wine?

Occasions where CO wine fits by drinker frequency:

- 71% of weekly wine drinkers believe a good CO wine occasion is at home entertaining guests – more so vs. other wine drinker groups.

Where Colorado wine fits (% agree)	Total	Special Occasion/ Holiday	1-3/mo.	Weekly
At home while cooking	40%	29%	38%	47%
At home entertaining guests	64%	52%	61%	71%
At home alone, while relaxing, reading or some other activity without food	52%	33%	52%	59%
At a restaurant before or with a meal	58%	47%	57%	60%
At a friend's house for a meal or a party	65%	57%	63%	69%
For a holiday meal or special occasion	63%	72%	57%	62%
As a gift for a co-worker or casual friend	64%	55%	61%	69%
Outdoor - picnic or BBQ	43%	33%	36%	51%

Q 28 For which of the following situations or occasions does Colorado wine fit in your opinion? Check all that apply.

Drivers for CO wine purchase in future:

- The most important factors when choosing a Colorado wine are consistent across wine frequency drinker groups.
- Weekly wine drinkers tend to skew slightly higher on points rated, magazine/newspaper articles, displays and price.
- Heritage, history, regions, displays & brand names are less important for all groups.

% people rating as important when deciding to buy Colorado wine	Total	Special Occasion/ Holiday	1-3/mo.	Weekly
Attractive label design	29%	25%	28%	31%
Eye catching wine display	20%	17%	21%	21%
Discounted price / on sale	45%	37%	43%	51%
Information displayed about the wine	53%	40%	56%	59%
Well-known winery name / brand name	20%	17%	19%	22%
Must be priced under a certain amount	54%	47%	52%	59%
Friend's recommendation	70%	58%	73%	76%
Store, restaurant, staff recommendation	55%	42%	58%	61%
A wine I am familiar with in the past	41%	30%	41%	47%
Won wine awards or medals	34%	20%	34%	43%
History / heritage of winery	21%	19%	20%	23%
Region that the wine is from	23%	19%	26%	22%
Description of wine flavor on label	60%	53%	63%	61%
Magazine / newspaper review or article	26%	18%	25%	32%
Chance to taste the wine before buying it	65%	56%	64%	72%
Internet – bloggers, social media recommendations, reviews	16%	14%	14%	18%
Points rated	34%	17%	33%	46%
Style of wine (red, white, rose, blend, fruit, plant)	77%	69%	79%	80%
Food / menu pairing	36%	32%	39%	36%
Fair price for quality of wine	79%	68%	80%	86%
Experiment –want to try a new wine I have not tasted before	53%	40%	50%	62%

Q 29 If you buy Colorado wine in the future, which factors will be most important when deciding what Colorado wine to buy?

Slide 36

DC10

"Take your friends on the CO Wine experience."

Doug Caskey, 9/10/2014

Data breaks by sub groups

Gender & Age

Wine consumption:

Males vs. Females

- A slightly higher percentage of females vs. males drink wine.
- A higher percent of men drink beer vs. females.
- In terms of frequency, males and females are on par.

Age

- A higher percent of younger consumers tend to drink beer & spirits vs. wine.
- Older consumers have a high penetration of wine consumption.
- A higher percent of younger wine consumers tend to consume wine monthly and at special occasions.

Incidence of drinking by alcoholic beverage type	Total before wine screen (n=1870)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
Wine	64%	73%	80%	57%	75%	79%	87%
Beer	48%	76%	51%	70%	57%	52%	47%
Spirits/Mixed drinks (whiskey, vodka, rum, gin, tequila, etc.)	51%	60%	58%	68%	63%	56%	42%

Frequency of wine consumption	Total wine drinkers N=1315	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
Daily	8%	8%	8%	3%	6%	9%	17%
More than once a week, but not every day	22%	19%	23%	23%	20%	22%	26%
Once a week	14%	11%	14%	17%	15%	12%	10%
2-3 times per month	19%	21%	19%	21%	18%	19%	18%
Once a month	11%	13%	11%	10%	12%	12%	11%
Special Occasions or holidays only	26%	29%	26%	26%	29%	27%	17%

Q.4 Which of the following alcoholic beverages have you consumed in the past month? Please check all that apply.

Q. 5 On average, how often do you drink wine?

Where heard of wine produced?

- A higher percent of older wine drinkers have heard of Colorado as a wine producing area.
- Males and females, for the most part, are on par for not only Colorado wine awareness, but other geographic areas, as well.

Where heard of wine production	Total wine drinkers (n=1315)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
California	98%	97%	98%	97%	98%	98%	99%
Oregon	53%	57%	52%	44%	54%	58%	55%
Colorado	84%	82%	84%	75%	82%	88%	87%
New York	31%	44%	27%	17%	21%	37%	57%
Idaho	9%	10%	8%	5%	8%	11%	8%
New Mexico	17%	20%	16%	14%	16%	19%	21%
Washington	54%	56%	53%	47%	53%	56%	59%
Argentina	61%	67%	59%	63%	60%	59%	67%
Spain	78%	82%	77%	79%	77%	77%	82%
France	94%	96%	93%	91%	95%	94%	96%
Italy	94%	93%	94%	93%	95%	92%	95%
Slovenia	6%	8%	5%	7%	4%	6%	8%
South Africa	37%	44%	35%	30%	36%	39%	44%

Q. 9 From which of the following geographic areas have you ever heard of wine being produced?

From where consumed?

- A higher percent of older wine drinkers have consumed Colorado before.
- A higher percent of females have consumed Colorado wine.

Consumed wine from:	Total wine drinkers (n=1315)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
California	93%	94%	92%	90%	91%	94%	97%
Oregon	37%	39%	36%	28%	36%	40%	43%
Colorado	74%	69%	76%	68%	74%	76%	80%
New York	17%	26%	14%	6%	11%	21%	34%
Idaho	3%	3%	3%	2%	2%	5%	2%
New Mexico	11%	10%	12%	8%	10%	13%	13%
Washington	40%	43%	38%	34%	37%	42%	48%
Argentina	42%	48%	40%	41%	43%	41%	45%
Spain	53%	59%	51%	52%	52%	51%	59%
France	72%	79%	69%	67%	71%	72%	80%
Italy	73%	73%	72%	69%	74%	74%	71%
Slovenia	2%	3%	2%	1%	2%	2%	4%
South Africa	25%	31%	24%	19%	26%	26%	31%

Q. 10 From which of the following geographic areas have you consumed wine? Check all that apply.

*Note –Q. 16 indicates 22% have never **purchased** CO wine. And data from Q. 25 indicate that 37% have never **consumed** or **purchased** CO wine.

From where purchased?

- A higher percent of younger wine drinkers tend to buy wine in multiple locations.
- More older consumers buy wine at a neighborhood liquor store vs. other locations.
- Restaurants are wine consumption locations as well.
- Males and Females have similar purchase locations for wine.

Where purchased?	Total wine drinkers (n=1315)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
Neighborhood liquor store	91%	84%	93%	96%	93%	89%	84%
Wine specialty shop	53%	52%	53%	64%	59%	47%	40%
Large, volume discount liquor store	68%	68%	68%	72%	68%	65%	66%
Grocery store that sells wine	51%	48%	52%	63%	52%	46%	43%
Restaurants	73%	69%	74%	80%	75%	70%	66%
Bars	54%	51%	55%	68%	57%	48%	40%
Farmer's markets	44%	40%	45%	57%	46%	39%	33%
Winery or wine tasting room	51%	47%	52%	61%	52%	48%	39%
Internet	43%	40%	44%	56%	46%	37%	33%
Wine Club (on-line, from a winery or mail-order)	46%	44%	46%	58%	46%	41%	39%
Other (e.g. sports/concert venue or wine festival)	39%	35%	40%	51%	38%	36%	29%

Q. 11 Approximately what percent of all the wine you bought during the past year, or so, came from the following retail locations? It's OK to enter 0 if you have not purchased wine from a particular location. YOUR ANSWERS MUST TOTAL TO 100%.

Note: Data adjusted to % population. Survey Monkey did not tally to 100%; thus actual share numbers are incorrect in Survey Monkey data output for these two questions.

Price paid per bottle:

- \$9 - \$15 is the price point paid per wine bottle for most wine drinkers, regardless of age and gender.

Price per bottle	Total wine drinkers (n=1315)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
Less than \$9 per bottle		14%	11%	10%	9%	12%	18%
\$9-\$11.99 per bottle		30%	34%	39%	32%	29%	37%
\$12-\$14.99 per bottle		36%	33%	33%	32%	36%	33%
\$15-\$19.99 per bottle		13%	15%	12%	18%	16%	6%
\$20-\$24.99 per bottle		5%	5%	3%	7%	5%	3%
\$25-\$39.99 per bottle		1%	2%	2%	1%	2%	1%
More than \$40 per bottle		0%	0%	0%	1%	0%	1%

Frequency of purchase – CO wine:

- Most sub groups tend to buy CO wine rather infrequently – less than once a year to a few times a year.

Co wine purchase	Total wine drinkers (n=1315)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
Have never purchased	22%	25%	21%	26%	22%	20%	20%
Less than once a year	28%	27%	29%	23%	30%	29%	30%
Around once a year	18%	21%	17%	16%	17%	18%	24%
A few times a year	27%	23%	28%	28%	26%	28%	23%
Monthly	5%	4%	5%	6%	5%	4%	4%
Weekly	0%	0%	0%	0%	0%	0%	0%

Q. 16 How often do you typically purchase wine from each of the following geographic areas?

Future PI by demographic group:

- California wine has strong future purchase intent among all sub groups.
- Of all sub groups, ages 21-35 have a higher percent interested in future purchase of CO wine.

Future Purchase Intent MEANS (5 pt. scale)	Total wine drinkers (n=1315)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
European Wine	3.60	3.55	3.62	3.69	3.68	3.54	3.49
Californian Wine	4.02	3.94	4.04	3.92	4.06	4.05	3.99
Colorado Wine	3.61	3.49	3.64	3.78	3.67	3.53	3.41
Washington Wine	3.20	3.03	3.25	3.21	3.29	3.18	3.06
Oregon Wine	3.16	3.00	3.20	3.20	3.28	3.10	3.00
Other American Wine	3.11	2.93	3.16	3.18	3.22	3.02	3.01
Australian or New Zealand Wine	3.36	3.21	3.40	3.37	3.49	3.29	3.27
South American (e.g., Argentina, Chile, Uruguay) wine	3.26	3.18	3.28	3.33	3.41	3.16	3.11
South African wine	2.85	2.69	2.90	2.99	2.99	2.73	2.70

Q. 17 In the future, how interested are you in purchasing wine from each of the following geographic areas?

Quality & price impressions by subgroups:

- Colorado wine is perceived to be lesser quality by all subgroups of wine drinkers, though slightly above average, which is 3.00.
- *Note: 3.00 is an average quality rating on a 5 pt. scale. 4.00 is above average and 2.00 is below average.*

Quality Mean scores (5 pt. scale) 1=poor quality 5=high quality	Total (n=1315)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
European wine	4.28	4.19	4.30	4.22	4.37	4.28	4.16
California wine	4.15	4.19	4.14	3.99	4.16	4.22	4.13
Colorado Wine	3.52	3.57	3.50	3.45	3.48	3.57	3.52

- Colorado wine is viewed as close to fairly priced (3.00 MEAN score) by both males and females.
- All subgroups view both Colorado and California wine as more fairly priced vs. European wines.

Value by user type MEAN (5 pt. scale) 1=underpriced 3= fairly priced 5= overpriced;	Total (n=1315)	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
European wine	3.70	3.70	3.69	3.68	3.66	3.72	3.73
California wine	3.25	3.70	3.69	3.26	3.28	3.25	3.18
Colorado Wine	3.28	3.29	3.27	3.28	3.24	3.30	3.29

Q. 19 Select the statement that best describes your opinion and impression regarding the quality of wines from each of the following geographic areas. Check one in each row. If you have never tried wine from a particular region or have no opinion, please select N/A.

Q. 21 Select the statement that best describes your opinion and impression regarding the pricing for the quality of wines from each of the following geographic areas. Check one in each row. 1=significantly underpriced (great bargain) to 5 = significantly overpriced (too expensive); 3= fairly priced.

Drivers for CO wine purchase in future by subgroup:

- Women are more affected (vs. men) by price, information, recommendations from store staff, wine flavor descriptions & label design, tasting, points and style of wine.
- Younger wine drinkers differ from older wine drinkers in their interest in label design & less use of internet / blogging than older wine drinkers.

CO wine purchase considerations by subgroup (% important)	Total	Males (n=290)	Females (n=1024)	21-35 (n=275)	36-50 (n=374)	51-65 (n=492)	66+ (n=174)
Attractive label design	29%	16%	32%	38%	30%	27%	17%
Eye catching wine display	20%	11%	23%	22%	21%	18%	18%
Discounted price / on sale	45%	37%	47%	52%	44%	40%	47%
Information displayed about the wine	53%	47%	55%	54%	55%	52%	52%
Well-known winery name / brand name	20%	21%	20%	19%	18%	20%	25%
Must be priced under a certain amount	54%	43%	57%	58%	55%	50%	55%
Friend's recommendation	70%	63%	72%	67%	72%	70%	74%
Store, restaurant, staff recommendation	55%	49%	57%	53%	57%	54%	55%
A wine I am familiar with in the past	41%	43%	40%	35%	40%	40%	53%
Won wine awards or medals	34%	31%	35%	32%	34%	35%	35%
History / heritage of winery	21%	21%	21%	16%	23%	20%	25%
Region that the wine is from	23%	20%	23%	22%	23%	23%	22%
Description of wine flavor on label	60%	46%	63%	61%	64%	57%	55%
Magazine / newspaper review or article	26%	22%	27%	21%	29%	26%	28%
Chance to taste the wine before buying it	65%	58%	67%	60%	68%	67%	63%
Internet – bloggers, social media recommendations, reviews	16%	13%	16%	12%	12%	20%	24%
Points rated	34%	27%	36%	33%	38%	33%	30%
Style of wine (red, white, rose, blend, fruit, plant)	77%	65%	80%	77%	78%	77%	73%
Food / menu pairing	36%	35%	36%	33%	36%	35%	42%
Fair price for quality of wine	79%	74%	81%	78%	81%	78%	81%
Experiment –want to try a new wine I have not tasted before	53%	48%	54%	50%	56%	54%	45%

Q 29 If you buy Colorado wine in the future, which factors will be most important when deciding what Colorado wine to buy?

Data breaks by sub groups

Core Colorado wine drinkers (n=362):

- Among monthly/ weekly / daily wine drinkers (Q 5)
- Also purchasing Colorado wine a few times/year to weekly (Q 16)

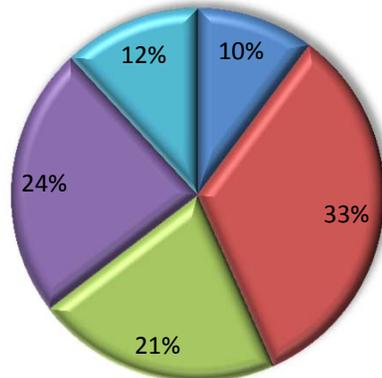
Core Colorado wine drinkers:

- Among Core Colorado wine purchasers, 88% purchased wine more than once a month.
- 83% purchased Colorado wine monthly or more frequently.

Frequency of wine consumption

Among Core –(monthly+ wine drinkers & purchase CO wine
few times/yr. to weekly)
(n=362)

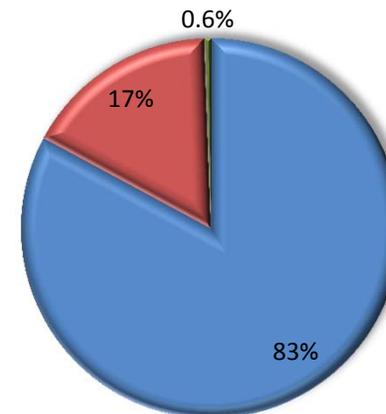
- Daily
- More than once a week, but not every day
- Once a week
- 2-3 times per month
- Once a month



Frequency of CO wine purchase

Among core (n=362)

- A few times a year
- Monthly
- Weekly



Q. 5 On average, how often do you drink wine?

Who are Core Colorado wine drinkers?:

- Core Colorado wine drinkers skew in income \$30k - \$150k – quite broad.
- Age is also broad – though less 66+.

Income – Core CO wine drinkers	
Under \$30,000	6%
\$30,000-\$49,999	17%
\$50,000-\$74,999	23%
\$75,000-\$99,999	17%
\$100,000-\$149,999	20%
More than \$150,000	8%

Age of Respondents – Core CO wine drinkers	
21-35	22%
36-50	29%
51-65	37%
66+	12%

Gender:

81% of Core CO wine respondents were female. Note – this does not reflect consumption by gender, rather incidence of respondents by gender.

Q. 5 On average, how often do you drink wine?

Where Core Colorado wine drinkers shop:

- Most Core CO wine drinkers shop for wine in neighborhood liquor stores (94%), restaurants & large volume discount stores.
- However, fewer shop for CO wine in all locations except wineries / wine tasting rooms.
- This is consistent with the total sample, where it could be that CO wines may not be available in all retail outlets.

Where shop for wine? Among Core CO wine purchasers	Wine	CO Wine
Neighborhood liquor store	94%	81%
Wine specialty shop	54%	46%
Large, volume discount liquor store	65%	49%
Grocery store that sells wine	49%	35%
Restaurants	76%	53%
Bars	56%	38%
Farmer's markets	44%	36%
Winery or wine tasting room	55%	54%
Internet	41%	31%
Wine Club (on-line, from a winery or mail-order)	45%	33%
Other (e.g. sports/concert venue or wine festival) Specify below	38%	29%

Q. 11 Where shop for wine?

Q. 26 Where shop for CO wine?

Future PI for CO wine among CO wine purchasers:

- Core Colorado wine purchasers are more interested in purchasing CO wine in the future and California wine.
- This shows California wine is a key competitor to Colorado wines in terms of future purchase.

Future Purchase Intent MEANS (5 pt. scale)	Total wine drinkers (n=1315)	Core CO Wine Purchasers (n=362)
European Wine	3.60	3.80
Californian Wine	4.02	4.29
Colorado Wine	3.61	4.39
Washington Wine	3.20	3.52
Oregon Wine	3.16	3.42
Other American Wine	3.11	3.43
Australian or New Zealand Wine	3.36	3.56
South American (e.g., Argentina, Chile, Uruguay) wine	3.26	3.52
South African wine	2.85	3.05

Q. 17 In the future, how interested are you in purchasing wine from each of the following geographic areas?

Quality & price impressions among core CO wine buyers:

- Similar to all wine drinkers, Core CO wine drinkers believe Colorado wine is of lesser quality than both California and European wines.
- *Note: 3.00 is an average quality rating on 5 pt. scale. 4.00 is above average and 2.00 is below average.*

Quality Mean scores (5 pt. scale) 1=poor quality 5=high quality	Total (n=1315)	Core CO wine buyers
European wine	4.28	4.29
California wine	4.15	4.16
Colorado Wine	3.52	3.86

Improving quality:

66% of Core CO wine respondents believe CO wines are improving (somewhat or significantly) in quality

- Colorado wine is viewed as close to fairly priced (3.00 MEAN score) by both males and females.
- Core CO wine purchasers also view both Colorado and California wine as more fairly priced vs. European wines.

Value by user type MEAN (5 pt. scale) 1=underpriced 3= fairly priced 5= overpriced;	Total (n=1315)	Males (n=290)
European wine	3.70	3.76
California wine	3.25	3.27
Colorado Wine	3.28	3.26

Q. 19 Select the statement that best describes your opinion and impression regarding the quality of wines from each of the following geographic areas. Check one in each row. If you have never tried wine from a particular region or have no opinion, please select N/A.

Q. 21 Select the statement that best describes your opinion and impression regarding the pricing for the quality of wines from each of the following geographic areas. Check one in each row. 1=significantly underpriced (great bargain) to 5 = significantly overpriced (too expensive); 3= fairly priced.

Wine price expectation among core CO wine purchasers:

- Pricing of California wines are expected to range from \$9-\$19.99 for most core CO wine drinkers.
- A larger percent expect to pay slightly more for CO wines vs. California wines.

	Less than \$9 per bottle	\$9 - \$11.99 per bottle	\$12 - \$14.99 per bottle	\$15 - \$19.99 per bottle	\$20 - \$24.99 per bottle	\$25 - \$39.99 per bottle	\$40 or more per bottle	N/A
European wine	2%	9%	20%	24%	17%	8%	3%	18%
California wine	6%	21%	30%	20%	8%	2%	0%	12%
Colorado wine	5%	17%	25%	20%	6%	1%	0%	26%

Q. 22 What do you expect to spend at a wine shop or liquor store for a typical bottle (750 ml) of wine from each of the following geographic areas? Think about the average price for each region. Check one in each row. If you have never purchased wine from a particular region or have no expectations about the price, please select N/A.

Wine region awareness & consumption among core CO wine purchasers:

- Generally, more Core CO wine purchasers are aware of Colorado wine growing regions vs. the total sample.
- And a higher percent have purchases CO wine from growing regions vs. the total.

Awareness of wine regions	Total	Core CO wine purchasers
Grand Valley American Viticulture Area	18%	27%
West Elks American Viticulture Area	4%	8%
Surface Creek	6%	11%
Montezuma County	15%	20%
Arkansas Valley	18%	24%
East Orchard Mesa	19%	30%
Redlands	14%	20%
Bowie Corridor	1%	1%
None of the above	50%	35%

Consumed or purchased by wine regions	Total	Core CO wine purchasers
Grand Valley Region, including Grand Junction, Palisade	34%	55%
West Elks Region, including Paonia, Hotchkiss, Cedaredge	7%	16%
Montrose, Delta	9%	18%
Front Range Region, including Denver, Boulder, Fort Collins, Loveland, Estes Park, Castle Rock, Fort Morgan	28%	47%
Pikes Peak/Arkansas Valley Region, including Salida, Woodland Park, Cañon City, Colorado Springs	15%	25%
Mountains, including Glenwood Springs, Minturn, Hartsel	11%	21%
Four Corners Region, including Cortez, Durango, Ignacio	7%	13%

Q. 23 Which of the following Colorado wine regions have you heard of or seen on a wine label? Check all that you have heard of.

Q. 25 If you have purchased or consumed Colorado wine from a Winery or wine tasting room, check all the geographic areas from which you have purchased or consumed Colorado wine at a winery or wine tasting room. If you have never purchased or consumed Colorado wine, PLEASE SELECT ONLY "I HAVE NEVER PURCHASED OR CONSUMED...."

Opinions & impressions of CO wine among CO wine purchasers:

- Similar to other sub groups, CO wine purchasers are interested in CO wineries, tasting events and local growers.

Opinions and Impressions of Colorado Wines MEAN (5 pt. scale) 1= strongly disagree to 5 = strongly agree	Total	Core CO Wine Purchasers
Colorado wines are fresher than other wines	3.18	3.36
I cannot find Colorado wines in stores	2.47	2.34
I like to buy Colorado and support local growers	4.08	4.36
I don't think about Colorado wines as locally grown	2.15	1.94
Colorado wines are more expensive vs. California wines	2.82	2.78
Colorado wines are higher quality vs. California wines	2.66	2.90
Colorado wines have fewer pesticides vs. other wines	3.05	3.17
I am interested in visiting Colorado wineries	3.92	4.32
I am interested in Colorado wine tasting events	3.81	4.18
High-elevation wines have a greater concentration of antioxidants that may prevent some diseases	3.18	3.29
Wines in Colorado are exposed to cooler nights and hotter days resulting in higher quality grapes	3.45	3.59

Q. 24 What are your opinions and impressions of Colorado wines even if you have never tasted any?

Occasions where CO wine fits among Core CO wine purchasers:

- 84% of CO wine purchasers believe a good CO wine occasion is at home entertaining guests – more so vs. other wine drinker groups.
- In general, among CO wine purchasers, occasion fit is much broader vs. the total sample. For these consumers, CO wines fit multiple occasions.

Where Colorado wine fits (% agree)	Total	Core CO wine purchasers
At home while cooking	40%	56%
At home entertaining guests	64%	84%
At home alone, while relaxing, reading or some other activity without food	52%	72%
At a restaurant before or with a meal	58%	74%
At a friend's house for a meal or a party	65%	79%
For a holiday meal or special occasion	63%	76%
As a gift for a co-worker or casual friend	64%	76%
Outdoor - picnic or BBQ	43%	53%

Q 28 For which of the following situations or occasions does Colorado wine fit in your opinion? Check all that apply.

Drivers for CO wine purchase among core CO wine purchasers:

- Core CO wine drinkers differ from the total sample in that a higher percent of them are experimental, wanting to try new wines.
- They are also more apt to rely on friends' recommendations.

CO wine purchase considerations by subgroup (% important)	Total	Core CO wine purchasers
Attractive label design	29%	35%
Eye catching wine display	20%	26%
Discounted price / on sale	45%	52%
Information displayed about the wine	53%	59%
Well-known winery name / brand name	20%	27%
Must be priced under a certain amount	54%	56%
Friend's recommendation	70%	79%
Store, restaurant, staff recommendation	55%	60%
A wine I am familiar with in the past	41%	59%
Won wine awards or medals	34%	35%
History / heritage of winery	21%	28%
Region that the wine is from	23%	31%
Description of wine flavor on label	60%	67%
Magazine / newspaper review or article	26%	26%
Chance to taste the wine before buying it	65%	69%
Internet – bloggers, social media recommendations, reviews	16%	15%
Points rated	34%	37%
Style of wine (red, white, rose, blend, fruit, plant)	77%	82%
Food / menu pairing	36%	42%
Fair price for quality of wine	79%	88%
Experiment –want to try a new wine I have not tasted before	53%	69%

Q 29 If you buy Colorado wine in the future, which factors will be most important when deciding what Colorado wine to buy?

Contact Info:

Barb Gasper · Focus Research & Strategy Inc. · 1531 Genesee Ridge Rd. Golden, CO 80401
· ph: 303-249-8948 · fax: 303-382-4630 · barb@focusrsi.com ~ www.focusrsi.com

Thank you.

