Colorado Wine Board

Quantitative Wine User Research III

Final Report ~ April 27, 2016

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Background and Objectives

Background:

- The Colorado Wine Industry Development Board (CWIDB) has tracked Colorado wine drinkers attitudes and usage of Colorado wines for three years. In 2014 and 2015, Survey Monkey provided the respondent panel and CWIDB/ Kyle & Doug programmed the survey and fielded it online.

- When comparing 2014 to 2015, the Survey Monkey panel was very different, which resulted in data that were difficult to compare.
  - In 2015, 46% of the respondents were male vs. 22% in 2014.
  - 80% of respondents in 2015 consumed wine weekly + vs. 43% in 2014.
  - The age breaks changed in 2015, so data vs. 2014 are not comparable by age.

- In 2016, a quota for age breaks and consumption was implemented, in order to keep the sample consistent from year to year. In 2016, there were 500 respondents, similar to 2015.
  - Note that in 2015 the panel was Survey Monkey, while in 2016, the panel shifted to Survey Sampling.
  - Going forward, the recommendation is to stay with Survey Sampling for consistent panel respondents.

Research Objectives:

- Compare 2016 vs. 2015 awareness, usage and attitudes toward Colorado wines among the total sample of Co. wine drinkers.
- Compare a subgroup of Denver wine drinkers (2015 vs. 2016).
- Cut data and compare measures by gender, age, frequent/weekly (1+) wine drinkers, hard cider drinkers and those who consume Colorado wine.
- Expose advertising to consumers to gauge effectiveness of the executions.

Respondents

Respondents

- 500 males (40% quota) & females
- Ages 21-70; quotas set at 21-35 (30%), 36-50 (30%), 51-70 (40%)
- Co. residents
- Past mo. wine consumption
- Sub cell of weekly+ wine drinkers (separate read of data).
- Denver metro sub set with minimum n=100 (separate read of data).

Methodology:

- Online quantitative test using SSI panel.
- Quotas were set for wine consumption frequency, so that data are comparable to 2015.

  Daily – 8%
  More than once a week 36%
  Once a week 19%
  2-3 times / month 26%
  1 time a month 8%
  Special occasions 3%

Creative Tested

Executive Summary

Key insights & recommendations

Key Insights:

Colorado wine consumers are educated – 72% have graduated college (2 yr. +)

66% of the sample drinks wine weekly or more often.

- 8% consume wine daily.

Awareness of Colorado wine production remains high:

73% of monthly wine drinkers are aware of wine produced in Colorado.

- This is down from 2015 (86%).
- California (96%), France(93%) and Italy (96%) remained relatively flat in awareness when comparing 2015 to 2016.

37% of monthly wine drinkers have never consumed wine from Colorado.

This is up from 2015– 25%.

- As comparison – 93% have consumed wine from California.
- Notably, the gap between Co. wine awareness (73%) and Co. wine consumption (63%) is only 10 percentage points – much lower than other countries, including Italy (gap 20 points) and France (gap 21 points).

Future Purchase Interest for Colorado wine improved significantly to 66% in 2016, up from 52% (top 2 box) in 2015.

Purchase intent still lags California and other European wines.

- As comparison – 89% are interested in purchasing wine from California; 78% European wines.

Wine purchase locations do not match up to where they'd expect to buy CO wine.

Neighborhood liquor stores, large discount stores and restaurants are wine purchase locations for most respondents.

- However, 64% of respondents expect to purchase CO wine at wine specialty shops, yet only 7% buy wine there.
- Also, 64% expect to buy CO wine at winery / wine tasting rooms, yet only 7% actually buy wine there.
- The exception is the Neighborhood liquor store – 72% expect to buy CO wine there – and respondents do shop there.
- Selection and convenience are key drivers as to why they shop where they do for wine.

In 2016, most respondents continue to spend less than $15 per bottle:

66% in 2016 spend < $15/bottle (63% in 2015).

- 34% spend $12 - $14.99 per bottle in 2016 (29% in 2015).

Key Insights:

Wine occasions that "fit" for CO wine do not match where most consumers drink wine:

Restaurant, holidays and in the home alone or with guests continue to be the occasions where most wine drinkers consume wine.

- However, when asked what occasions fit best for CO wine, none of the top occasions fit. See chart 21.
- As an example, 78% believe wine fits for a restaurant occasions, yet only 39% believe restaurants are a fit for CO wine occasions.

CO wine purchasers bought Colorado wine infrequently:

36% of wine drinkers purchased Colorado wine once a year or less.

- Increasing their share of occasions from once to twice per year would double their volume.
- Since they have already purchased Colorado wine, assuming drinking it was a positive experience, repeat purchase should present no barriers to purchasing CO wine again.
- In terms of percent of total wine purchases, Colorado wine is small - less than 10% of their total for 52% of 2016 wine drinkers.

Perceptions of quality of Colorado wine might be a barrier to purchase / trial.

Even among CO. wine purchasers, quality perceptions lag California and European wines.

- In 2016, quality for CO wine is average – 3.46 mean – on par with 2015 - 3.37 mean.
- Europe and California have perceptions of high quality – 4.31 & 4.21 means – respectively. (Note – 4.00+ means are strong).
- 57% of consumers believe Colorado wine quality is improving, however, 40% believe it's staying the same.

Wine from Europe is thought to be pricey, while Colorado wine is "fairly priced" for 73% of respondents.

Most expect to pay a range of $9-$19.99 for both California and Colorado wines.

- In 2016, quality for CO wine is average – 3.46 mean – on par with 2015 - 3.37 mean.

Opinions and impressions of Colorado wines are positive for many.

Quality wines, supporting local growers, and visiting wineries and attending wine tasting events are of interest and strong agreement.

- When asked what Colorado wines they've purchased or heard of in the past, on an open end basis, Holy Cross/Holy Cross Abbey was mentioned by most, followed by Canyon Wind / Canyon.
- Many suggested more advertising for CO wines; only 12-13% had seen advertising.

Key Insights: Subgroups

Respondents who had consumed Colorado wine like to experiment.

They drink wine from multiple states and regions.

- And they consume wine more frequently vs. the total sample.
- They are slightly older and more affluent vs. the total sample.

Consumers who drink Colorado wine expect it to be sold in multiple retail outlets:

Yet, when it comes to purchasing Colorado wine, these same outlets are not locations where they actually buy Colorado wine. Share of purchase is primarily in neighborhood liquor stores and large volume discount liquor stores. See chart 39.

- This could be that Colorado wine is not sold in multiple channels, where they expect to buy it.
- Or it could be that they don't shop at these same channels.

Even among drinkers of Colorado wine, quality of Colorado wine lags California wine.

California wine is believed to be high quality among 80% of CO wine drinkers (top 2 box) vs. Colorado wine (57% top 2 box).

- Closing this gap (23 percentage points) among drinkers of Colorado wine will help with repeat purchase.

CO wine purchasers bought Colorado wine infrequently, though future purchase interest is strong.

36% of Colorado wine drinkers purchased Colorado wine a few times per year; 44% once a year or less.

- Increasing their share of occasions from once to twice per year would double their volume.
- Since they already purchase Colorado wine (no barriers) it seems a good opportunity to increase volume among this user.
- Past Colorado wine drinkers also believed the quality to be slightly better vs. other sub groups of drinkers.
- Future purchase intent among CO wine drinkers is 75% top 2 box vs. 66% among the total sample.

More frequent, weekly+ wine purchasers tend to buy Colorado wine vs. monthly / less frequent drinkers.

47% of weekly wine drinkers purchase Colorado wine more than annually.

- 28% purchase Colorado wine a few times a year.
- Weekly+ drinkers spend more per bottle – up to $19.99 vs. $14.99 for the total sample.
- Weekly + drinkers rate Colorado wines relatively higher on quality scores vs. the total sample.

Key Insights: Subgroups

Weekly+ wine drinkers are more engaged in the wine category – including Colorado wines.

They consume wine in more occasions and spend more on bottles of wine vs. the total sample.

- Colorado wine impressions of quality are higher among weekly+ drinkers vs. the total sample.
- 47% of weekly+ wine purchasers buy Colorado wine more than annually; more than the total (42%).

Of all subgroups, males, hard cider drinkers and older consumers drink wine more often.

70% of males, hard cider drinkers and 51-70 age group consume wine weekly or more often.

- However, fewer older consumers are interested in future purchase of CO wines – 58% (Top 2 box).
- 79% (Top 2 box) of younger, 21-35 wine drinkers state interest in purchase of CO wines in the future.
- 77% (Top 2 box) of Hard Cider drinkers state future purchase interest in CO wines.

Females rated multiple attributes a strong 4.00+ mean on a 5 pt.. scale – more so vs. males.

Hard cider drinkers and younger 21-35 drinkers also rated multiple attributes above 4.00+.

- “Restaurants that feature locally grown food should also feature local wines” had strong agreement among all subgroups, especially females (4.23 mean).
- Multiple subgroups believe the Colorado wine industry has “potential for future growth” – rating this statement above 4.00 mean.

Recommendations

Fill the gap between "aware" of Co wine and trial / "future PI" of Colorado wine.

- 73% are aware, but 37% have never consumed CO wine.
- 66% state future purchase interest in CO wine, but this lags California wines purchase interest at 89%.
- Offer tastings, promotions and events for trial – consumers state strong interest in these events.

Increase distribution outlets for CO wine to locations where consumers shop for wine.

- Restaurants, neighborhood liquor stores and discount – volume liquor stores are where consumers shop for wine.
- Colorado wines must have a visible presence in these outlets.

Consider occasion-based advertising to help communicate that CO wine is a "fit" for multiple occasions.

- Restaurant and in-home occasions are top wine consumption occasions that currently do not "fit" for CO wine.
- As with other category advertising, occasion – based messages help "show" where CO wine is consumed.

Improve quality perceptions of Co wine - more in line with California and European wines:

- Impressions of CO wine quality continue to be lower vs. California & Europe.
- To convert consumption from California, Colorado wines must be perceived to have high quality and CO wines must give consumers a reason why to convert from California wines.
- Wine awards, honors, taste reviews in magazines may help. Social media "buzz" may help, as well.

Increase local advertising reach.

- The two ad campaigns in this test made 58% and 62% of respondents more interested in buying CO wine.
- Help consumers understand why Colorado locally grown wines are higher quality – why is local better?
- Let consumers know CO wine fits for multiple occasions.

Recommendations

Consumers that have had Colorado wine in the past are key target consumers.

- They have already tried CO wine – no barrier to trial.
- The challenge is getting them to repeat purchase.
- Tactics for repeat purchase could be incorporated into the marketing plan. Social media / Internet is an excellent tool to keep in touch with CO wine purchasers.
- Consider a CO wine purchaser panel / club with benefits for members online.

Target younger 21-35 wine drinkers (who are also cider drinkers – 42%)

- 21-35 are least aware of CO wine (62%) and least likely to consume it (57%).
- But they are the most interested in future purchase (79% top 2 box PI).
- Hard cider and younger drinkers are experimental, want to attend wine tasting events and likely access social media often – again, potentially a good tool to increase awareness and trial among this key target.

Target males & appeal to older drinkers with messages.

- Consider younger, male-focused occasions in consumer communications.
- While not a direct target, older drinkers do consume wine frequently. 87% are aware of CO wine – so, getting more of them to consume CO wine more frequently is a logical step.

Consider borrowing from the Colorado craft beer "local" message success.

- Colorado is the "craft beer capital" – and craft beer consumers take pride in their locally produced CO beer.
- Likewise, particularly among younger wine drinkers, buying local, visiting local wine tasting events and visiting local wineries are popular areas of interest.

COLORADO
A BEAUTIFUL STATE OF
WINE

Detailed Findings

Among the total sample of wine drinkers
2016 vs. 2015

Who are wine drinkers?:

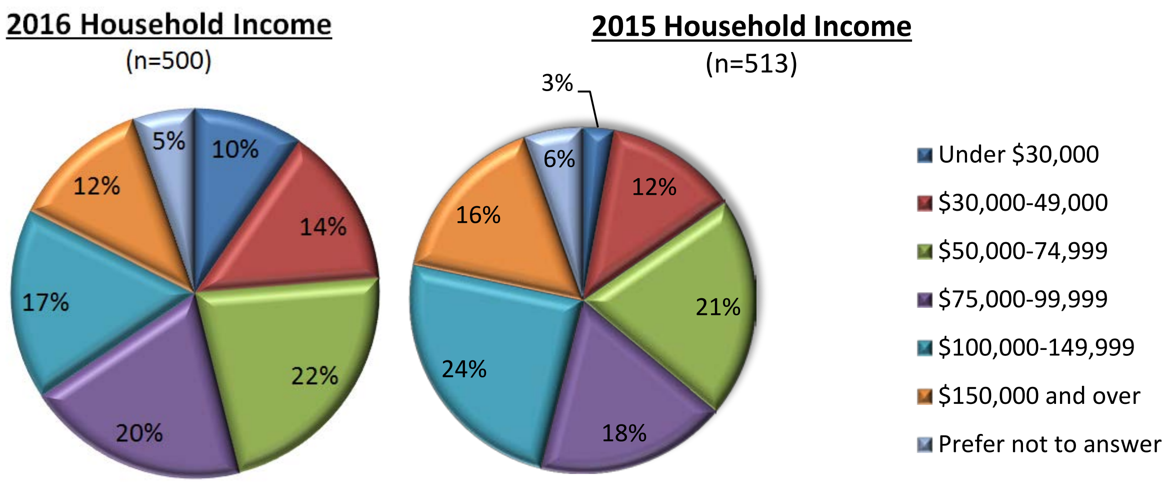
Wine drinkers drink all kinds of alcohol:

- 74% also consume beer & 67% spirits.
- Hard cider penetration among wine drinkers remained flat – 24% in 2016 and 23% in 2015.

Past month wine drinkers	2016 % also consume other alcohol (n=500)	2015 % also consume other alcohol (n=513)
Wine	100%	100%
Beer	74%	79%
Spirits, mixed drinks or straight whiskey, vodka, gin, rum, etc.	67%	71%
Hard Cider	24%	23%

Income of wine drinkers:

- Around half; 49% of 2016 wine drinkers earn $75,000+ in annual household income.
- This is lower vs. the panel in 2015 - 58%.



Q.S5 Which of the following alcoholic beverages have you consumed in the past month? Please check all that apply.
Q. S8 What range does your annual household income fall into?

Demographics of wine drinkers:

Age, Education & Gender

- In 2016, age quotas were set so that the respondent make up is similar to 2015.
- Gender quotas were also set; 40% males. Though, males were the last quota to fill in the 2016 survey, indicating more female wine drinkers are online, responding to surveys.
- Education fell naturally and 72% of wine drinkers in Colorado are college graduates.

AGE	AGE - 2016 (n=500)	AGE - 2015 (n=513)
21-35	30%	24%
36-50	30%	28%
51-70	40%	48%

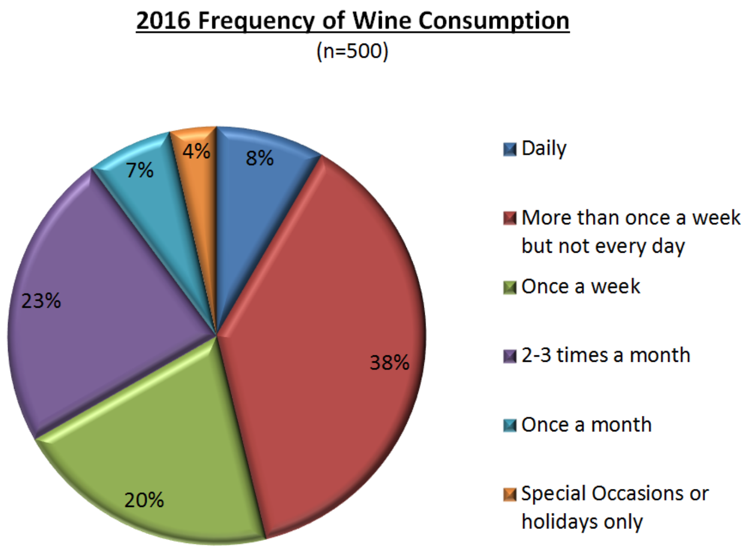
GENDER	2016 (n=500)	2015 (n=513)
Male	40%	46%
Female	60%	54%

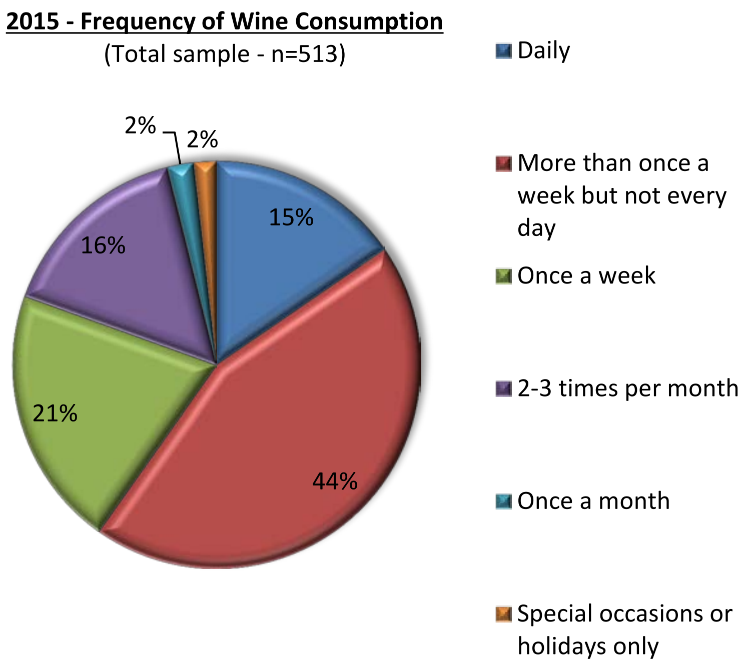
Education– % total sample	2016 (n=500)
Graduated high school	6%
Some college	22%
Graduated 2 year college	10%
Graduated 4 year college	37%
Post Graduate degree- masters or doctorate	25%

Q. S1 What is your gender?
Q. S4 In which range does your age fall?
Q. S9. What is your highest level of education? (check one). Note – not asked in 2015.

Frequency of wine consumption:

- In 2016, quotas were set to ensure the incidence of respondents falling in different wine consumption frequencies was somewhat similar to 2015. Recall, with the Survey Monkey panel, 2015 vs. 2014 was dramatically different – so much so that data were not comparable on measures affected by frequency of wine consumption.
- In 2016, 66% of the sample consumes wine weekly or more often; 8% daily.



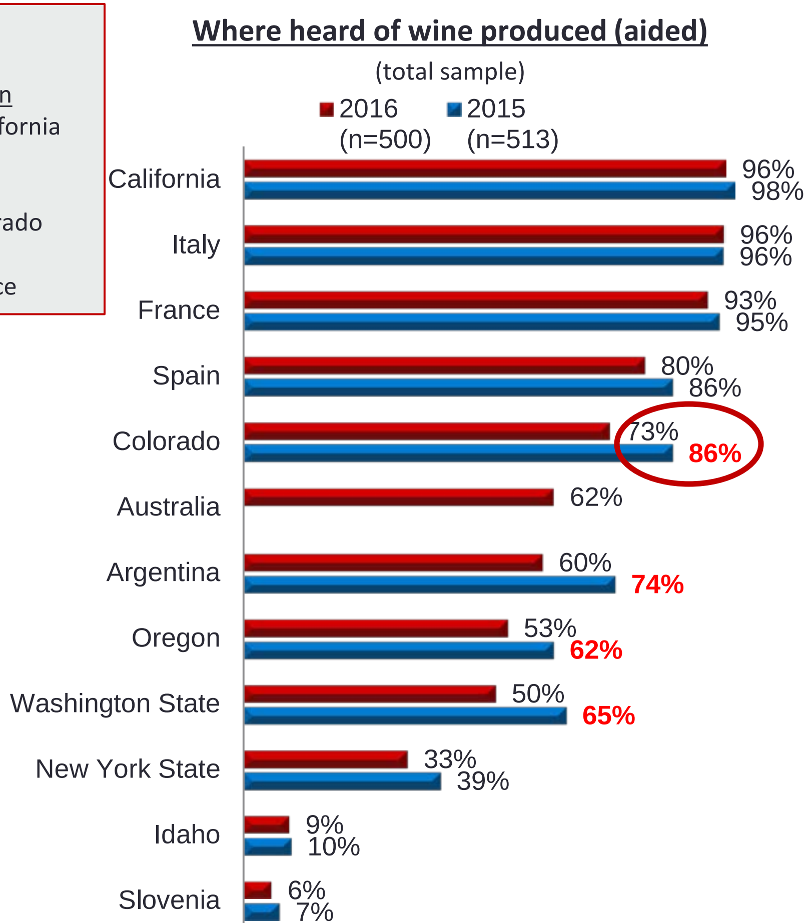


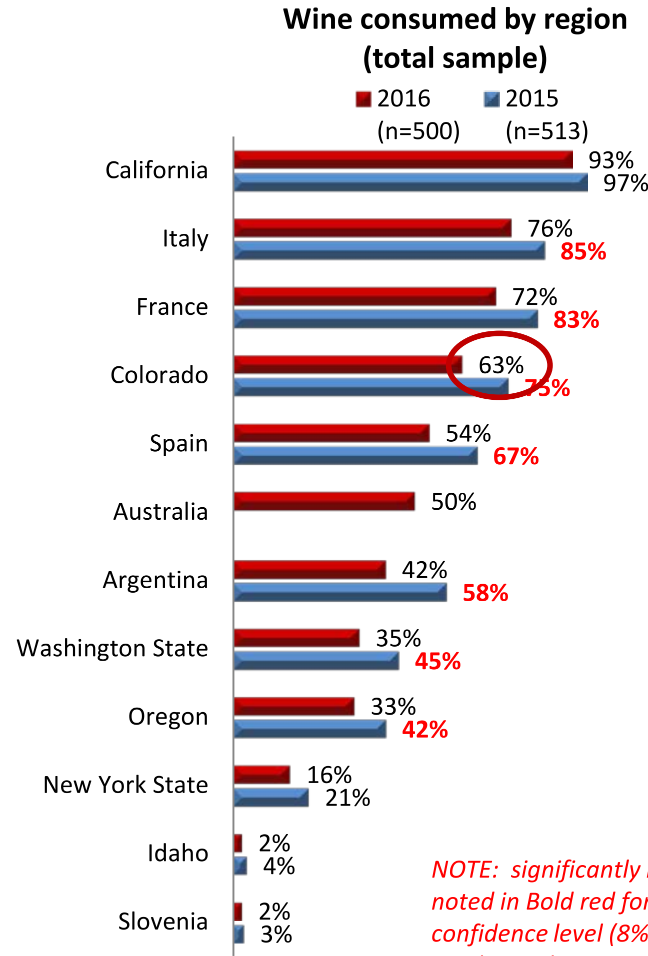
Q.S6 On average, how often do you drink wine?
Note: Total sample = wine drinkers

Awareness vs. consumption:

- 73% of Colorado wine drinkers know wine is produced in Colorado; significantly down from 86% in 2015. This is likely a sample difference, since multiple geographies are significantly down vs. 2015 – noted in red font.
- Notably, the gap between Co. wine awareness and Co. wine consumption is only 10 percentage points – much lower than other countries, including Italy (gap 20 points) and France (gap 21 points).

Open end Awareness First mention
- 62%-California (& Napa, Sonoma)
- 2%-Colorado
- 8%-Italy
- 8%-France





NOTE: significantly higher differences noted in Bold red font at the 95% confidence level (8%+ points) among total sample.

Q. 1 What geographic areas come to mind when thinking about where wine is produced? Write in.
Q. 2 From which of the following geographic areas have you ever heard of wine being produced? (check all that apply)
Q. 3 From which of the following geographic areas have you consumed wine? Check all that apply.

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

- When comparing where respondents purchase wine, in both 2016 and 2015, the largest "share of purchase locations" is at Neighborhood liquor stores (38% of wine is purchased here). The second largest wine purchase location is Large, Volume discount liquor stores – for both 2016 (22%) and 2015 (28%).
- Respondents expect to buy Colorado wines in completely different retail outlets – 64% indicate they'd expect to find Colorado wine at Wine Specialty shops (yet only 7% of wine is purchased there) and Winery or wine tasting rooms (only 4% of wine is purchased there).
- 72% expect to be able to purchase Colorado wines at Neighborhood liquor stores.
- Selection and Convenience are important factors when purchasing wine.

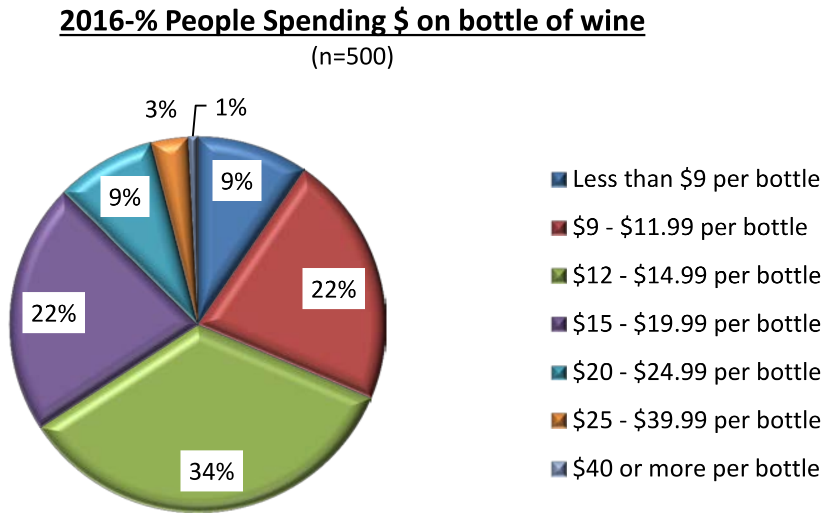
Share of wine purchase locations				Where you'd expect to buy Co. wine (check all that apply)
Among total sample	2016 (n=500)	2015 (n=513)		2016 (n=500)
Neighborhood liquor store	38%	31%		72%
Wine specialty shop	7%	5%		64%
Large, volume discount liquor store	22%	28%		51%
Grocery store that sells wine	6%	6%		31%
Restaurants	12%	12%		49%
Bars	5%	6%		33%
Farmer's markets	1%	0%		39%
Winery or wine tasting room	4%	5%		64%
At a sport or concert venue	1%	1%		13%
Internet	3%	4%		22%
Other	2%	1%		1%
TOTAL	100%	100%		NA

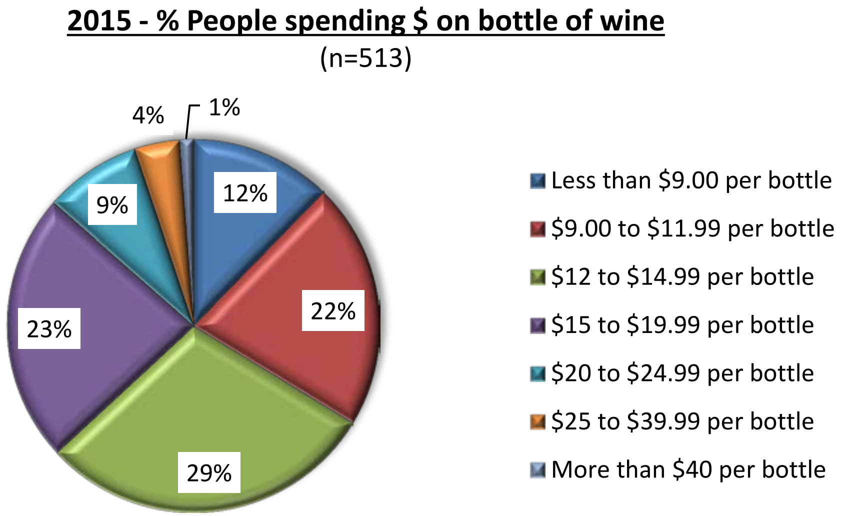
Wine decision factors	2016 (n=500)
Selection	70%
Convenience	55%
Knowledgeable staff or other reliable source of information about the wines	39%
Supporting local businesses	38%
Quality of service	28%

Q. 4 What percent of all the wine you bought, during the last year or so, was from the following retail locations? If you don't buy wine at a location, please enter "0".
Q 14 What percent of all the **Colorado wine** you consumed or bought, during the last year or so, was from the following locations? If you don't buy wine at a location, please enter "0".
Q. 16 Where would you expect to buy **Colorado wines?** (check all that apply)
Q. 6 Other than price, what factors influence where you most like to purchase wine? (check all that apply)

Most continue to spend less than $15/ bottle:

- 66% in 2016 spend < $15/bottle (63% in 2015).
- 34% spend $12 - $14.99 per bottle in 2016 (29% in 2015).
- 32% typically spend less than $12 per bottle in 2016 (34% in 2015).

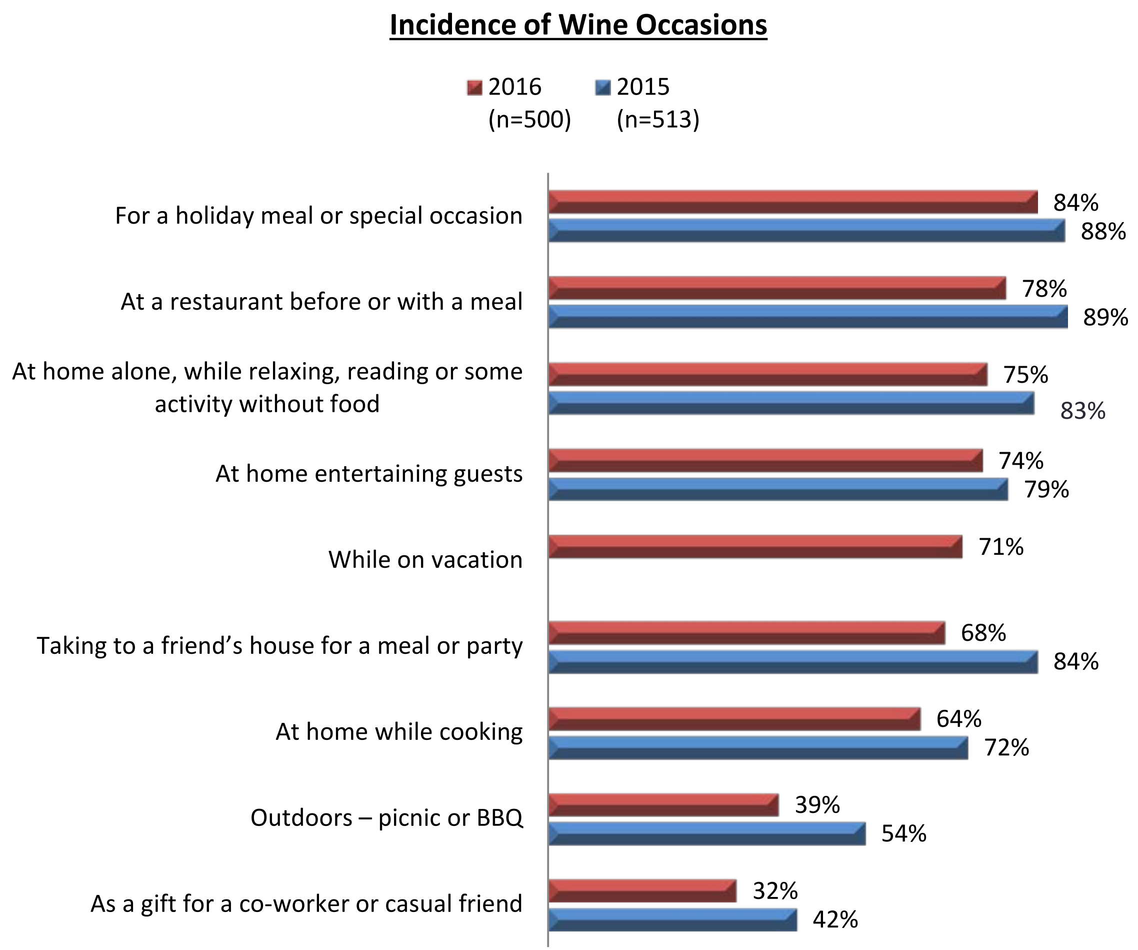




Q. 5 How much do you typically spend on a standard (750 ml) bottle of wine at a liquor store, a grocery store, or a specialty wine shop?

Occasions for wine:

- As in 2015, 2016 respondents participate in a wide variety of wine occasions.
- Top occasions for wine continue to be:
  - Holiday meal
  - Restaurant
  - At home
  - Friend's home
- 71% of wine drinkers indicate they drink wine while on vacation – a new occasion measured in the 2016 study.
- While many of the scores are significantly less in 2016 vs. 2015, this is likely due to a difference in panel providers vs. a true lessening of occasion participation.



Q. 7 At which of the following occasions have you consumed wine over the last year or so? (check all that apply) .

Occasions for wine vs. for CO wine:

- In 2016, respondents' occasions for wine in general vs. where they'd expect Colorado wine to "fit best" are quite different.
- While 84% of wine drinkers believe wine fits a holiday meal, only 39% believe this occasion is a fit for Colorado wine – a gap of 45%.
- Similarly, 78% of wine drinkers believe wine fits at a restaurant, while only 37% believe this occasion is a fit for Colorado wine – a gap of 41%.
- Net – increasing consumers' thoughts that Colorado wines fit in more occasions might help close the gap.

2016 – Total Sample	Occasions consumed wine	Occasions best fit CO wine	Gap
For a holiday meal or special occasion	84%	39%	-45%
At a restaurant before or with a meal	78%	37%	-41%
At home alone, while relaxing, reading or some activity w/o food	75%	53%	-22%
At home entertaining guests	74%	48%	-26%
While on vacation	71%	23%	-48%
Taking to a friend's house for a meal or party	68%	47%	-21%
At home while cooking	64%	35%	-28%
Outdoors – picnic or BBQ	39%	35%	-4%
As a gift for a co-worker or casual friend	32%	41%	8%

Q. 7 At which of the following occasions have you consumed wine over the last year or so? (check all that apply)
Q. 15 For which of the following occasions does **Colorado produced wine** fit best in your opinion? (check all that apply)

Frequency of wine purchased by region:

- California wine is consumed monthly by 35% of wine drinkers in 2016, whereas Colorado wine is consumed monthly by 13%. This is a gap of 22%'age points. In 2015, the gap was 31 points (42% California vs. 9% Colorado), thus this gap appears to be closing.
- Colorado wine is consumed among 16% on a weekly/monthly basis, up from 10% in 2015. This gap appears to be closing, as well.
- 21% say they have never purchased CO wine in 2016 - 17% in 2015.

2016 - % wine drinkers	Have never purchased	Less than once a year	Around once a year	A few times a year	Monthly	Weekly
European wine (e.g. France, Italy, Germany, etc.)	8%	16%	15%	42%	16%	2%
California wine	2%	4%	8%	45%	35%	7%
Colorado wine	21%	22%	14%	26%	13%	3%
Washington and Oregon wine	29%	20%	17%	23%	10%	1%
Wine from US States other than CA, OR, WA and CO	27%	26%	13%	25%	8%	1%
Australia and New Zealand wine	27%	18%	15%	29%	9%	2%
South American wine (e.g. Argentina, Chile, etc.)	28%	19%	14%	27%	11%	2%
California Wine - 2015	1%	5%	7%	36%	42%	9%
Colorado Wine - 2015	17%	20%	21%	32%	9%	1%

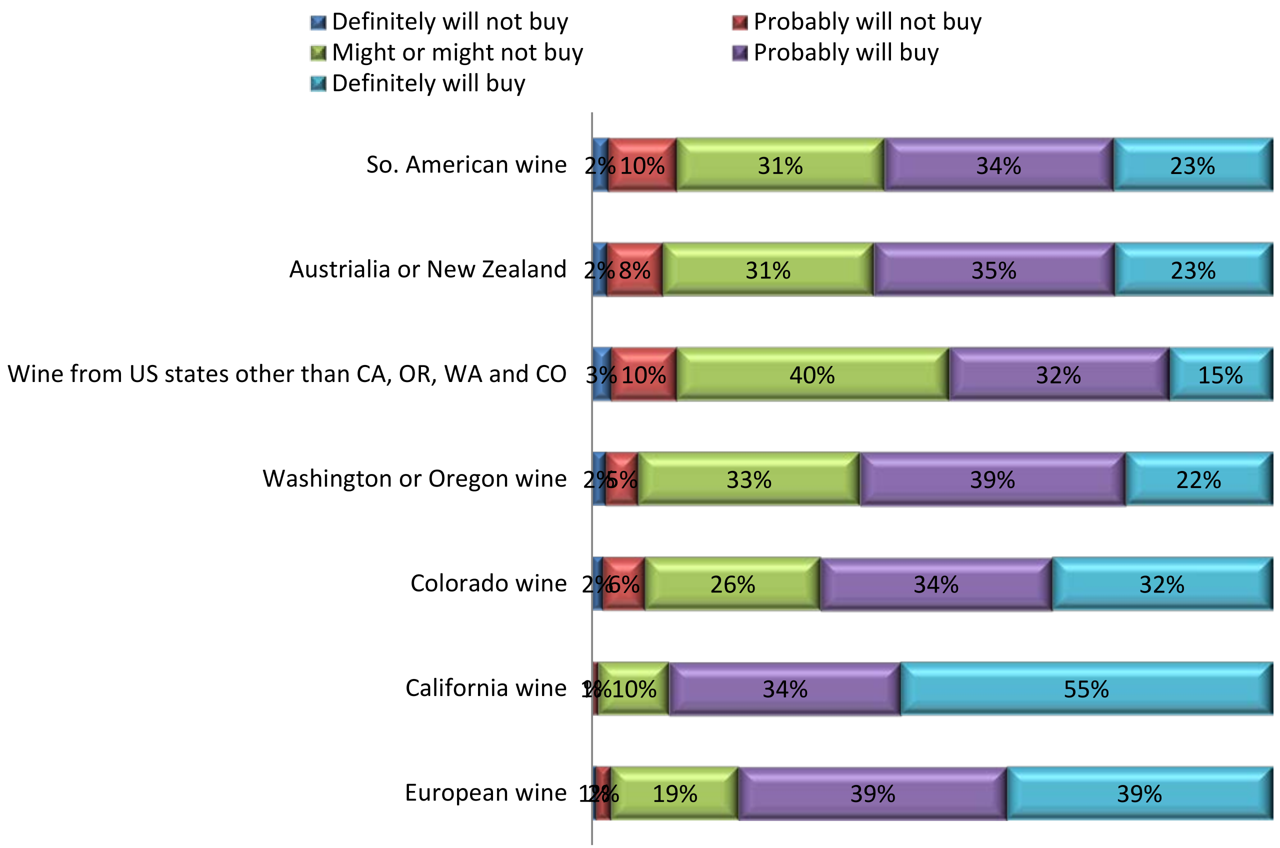
Q. 8 How often do you typically purchase wine from each of the following geographic areas? (check one timeframe that describes you best)

Future Purchase Interest:

- 66% of 2016 respondents are definitely or probably interested in purchasing CO. wine in the future; up from 52% in 2015. Importantly, only 8% are *not* interested in purchasing CO wine in the future.
- California future purchase remained relatively flat; 89% state interest in 2016 and 87% in 2015 – likely an indication of saturation among wine drinkers.
- Vs. California wine, Colorado is 23 %'age points behind in "future purchase interest."

2016 Future Purchase Interest by Geography

(n=500)



2016 – Top 2 Box % PI	2015 – Top 2 Box % PI
57%	61%
58%	58%
47%	30%
61%	48%
66%	52%
89%	87%
78%	71%

Q.9 In the future, how interested are you in purchasing wine from each of the following geographic areas? (check one)

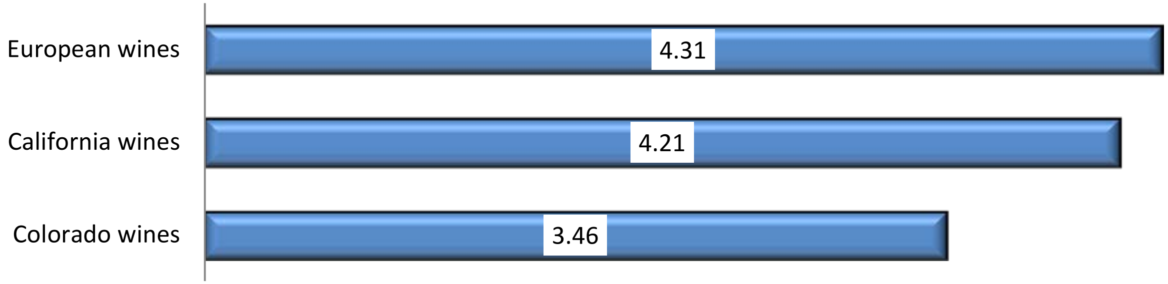
NOTE: significantly higher differences noted in Bold red font at the 95% confidence level (8%+ points) among total sample.

Impressions of quality by region:

- Quality impressions among 2016 wine drinkers continues to be very strong for European and California– above 4.00 mean. Similar to 2015.
- Colorado quality impression continues to be average in 2016 – 3.46 mean.

2016 - Quality of Wine Impression

(Mean score - 5 pt.. scale)



2015
4.35
4.16
3.37

- A majority in 2016 - 57% - believe Colorado wine to be improving somewhat or significantly – on par with 2015, 58%.
- Interestingly, California wine is also believed to be improving among 49% of wine drinkers and in the blue chart above, we see that impressions of quality is already high. Unlike European wines, where most (67%) believe quality is about the same; fewer believe it to be improving from high quality scores in blue chart above.

Changes in quality Among total wine drinkers (n=500)	Quality significantly declining	Quality somewhat declining	Quality staying about the same	Quality somewhat improving	Quality significantly improving
European wine - 2016	0%	3%	67%	20%	9%
Californian wine - 2016	0%	3%	48%	38%	11%
Colorado wine - 2016	0%	3%	40%	43%	14%
Colorado wine - 2015	0%	1%	41%	46%	12%

Q. 10 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.

Q. 11 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)

Value & price expectation by region:

- 62% of 2016 wine drinkers believe European wine is somewhat or extremely over priced.
- 73% believe Colorado wine is fairly priced in 2015 vs. 64% in 2015.
- California wine is also believed to be fairly priced by most.

Total wine drinkers (n=500) Value	Extremely underpriced	Somewhat underpriced	Fairly priced	Somewhat overpriced	Extremely overpriced
European wine	0%	1%	37%	54%	8%
Californian wine	0%	2%	70%	25%	3%
Colorado wine 2016	0%	3%	**73%**	21%	3%
Colorado wine 2015	0%	2%	64%	**29%**	4%

NOTE: significantly higher differences noted in Bold red font at the 95% confidence level (8%+ points) among total sample.

- Most wine drinkers expect to pay $9 - $19.99 for Colorado wine. This is similar to California wines and on par with 2015 expected pricing. Recall from chart 19 that 66% in 2016 spend < $15/bottle (63% in 2015).
- As in 2015, European wines are expected to cost more; $15-$25 per bottle, by most people in 2016.

Total wine drinkers (n=513) Expect to Pay	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
European wine	2%	9%	20%	29%	21%	13%	6%
California wine	7%	19%	31%	25%	12%	5%	1%
Colorado wine 2016	6%	22%	35%	26%	8%	2%	1%
Colorado wine 2015	5%	20%	31%	30%	13%	2%	0%

Q. 12 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.
Q. 13 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? Check one in each row.

Colorado Wines:

- When asked what Colorado wines they've purchased or heard of in the past, on an open end basis, Holy Cross/Holy Cross Abbey was mentioned by most, followed by Canyon Wind / Canyon.
- In terms of percent of total wine purchases, Colorado wine is less than 10% of their total for 52% of 2016 wine drinkers.
- 55% have not visited a Colorado winery.

Open end – brand of CO wine (4+ mentions)	2016 (n=122)
Holy Cross, Holy Cross Abbey, Abbey	11%
Canyon Wind, Canyon	10%
Plum Creek	8%
Colorado, Colorado Peach, Colorado Rose	8%
Carlson, Carlson Garfield, Carlson Sweet Baby Red, Carlson's, Carlson Vineyards	7%
Palisade, Palisades, Palisade Peach	7%
Two Rivers, 2 Rivers	7%
Balistreri	6%
Infinite Monkey, Infinite Monkey Theorem	5%
Talon	5%
St. Katherine, St. Catherine	5%
Ten Bears, 10 Bears	4%
Aspen Peak	3%
Graystone, Greystone	3%
Redstone, Redstone Meadery	3%

Visited Co. Winery	2016 (n=500)	2015 (n=513)
Yes, many times, all across the state	7%	11%
Yes, but only on the Western Slope (Palisade, Grand Junction, Paonia, Cortez, etc.)	13%	**25%**
Yes, but only on the Front Range (Denver, Boulder, Loveland, Colorado Springs, etc.)	17%	22%
Yes, but only in the mountains (Woodland Park, Glenwood Springs, Salida, Cañon City, etc.)	8%	12%
No. I have never visited a Colorado Winery or tasting room.	**55%**	36%

Percent of total Wine purchases	2016 (n=500)	2015 (n=513)
More than 50% of my wine purchases are Colorado wine	6%	2%
25% to 49% of my wine purchases are Colorado wine	12%	6%
10% to 24% of my wine purchases are Colorado wine	9%	7%
10% to 19% of my wine purchases are Colorado wine	16%	9%
1% to 9% of my wine purchases are Colorado wine	31%	28%
Less than 1% of my wine purchases are Colorado wine	21%	29%
I do not purchase Colorado wine	5%	19%

Q 17 What brands of **Colorado wines** have you heard of, consumed or purchased in the past? (write in)
Q 18 What percentage of your overall wine purchases would you estimate is Colorado wine? Think about the percentage of your purchases in terms of volume.
Q 20 Have you ever visited a Colorado winery or tasting room?

Opinions of Colorado wines:

- Wine drinkers are positive on a number of attributes – those above 4.00 mean are quite strong:
  - Restaurants should feature Co. wines
  - Industry has potential for growth
  - Support local growers
  - Experimental and taste different styles

Among total wine drinkers	2016 (n=500) Mean (5 pt. scale)	2015 (n=513) Mean (5 pt. scale)
I believe there are quality wines made in Colorado	3.93	na
I can easily find Colorado wine at my local wine shop or liquor store	3.41	na
I like to buy Colorado and support local growers	4.09	4.00
I think of wines made in Colorado in the same way I do locally grown produce	3.63	na
Craftsmanship is apparent in Colorado wines	3.60	3.35
I am interested in visiting Colorado wineries	4.01	3.97
I am interested in Colorado wine tasting events	3.92	3.81
I see and hear more and more about Colorado wines than I used	3.24	na
I think the Colorado wine industry has potential for future growth	4.13	na
Restaurants that feature locally grown food should also feature local wines	4.18	3.96
Grapes in Colorado are exposed to cooler nights and hotter days which leads to better wines	3.47	3.31
I like to experiment and taste different styles of wine and wines from different regions	4.12	na

Q. 19 What are your opinions and impressions of **Colorado wines?** Check below how much you agree or disagree with each statement. (check one per row)

Advice – open end:

- Almost have of the respondents who offered advice indicate more advertising, marketing would get them to buy and drink more Colorado wine.

Open end – advice (n=296)	%
More advertising/marketing	48%
Feature it in local stores/restaurants/bars	14%
Wine tasting/free samples	13%
Lower/reduce price	11%
Sponsor local events	7%
Availability/ Have it sold in more places - not available where I shop, etc.	6%
None/everything is good/keep it up/positive mentions	4%
Offer more variety/selections of wines	2%
Take it to farmers market	2%
Offer coupons	1%
Make it more accessible	1%

Q. 21 What advice do you have for Colorado wine producers to get people like you to buy and drink more Colorado wine?

Metro Denver Scorecard: 2016 vs. 2015:

- More Denver metro wine drinkers are interested in purchasing CO wine in the future – 65%.
- 74% believe CO wine is priced fairly, up from 63% in 2015.
- Awareness and consumption is down from 2015 in Denver Metro, but this could be a sample sourcing difference between Survey Monkey and Survey Sampling panels.

Denver Metro	**2016 (n=280)**	**2015 (n=294)**
Heard of CO wine	76%	**87%**
Consumed CO wine	65%	**76%**
20%+ share of purchase is CO wine	**27%**	11%
Have never purchased CO wine	23%	17%
Future PI CO wine (Top 2 box – 5 pt.. scale)	**65%**	51%
Quality of CO wine (top 2 box – 5 pt.. scale)	44%	44%
Price/quality of CO Wine –priced fairly	**74%**	63%
Typically pay $9-11.99/bottle	20%	23%
Typically pay $12-14.99/bottle	**38%**	30%
Typically pay $15-19.99/bottle	20%	25%
I like to buy and support local growers (mean – 5 pt.. scale)	4.05	4.04
Restaurants that feature locally grown food should also feature local wines (mean – 5 pt.. scale)	4.18	3.97

NOTE: significantly higher differences noted in Bold red font at the 95% confidence level.

Ad communication:

- 13% had seen this ad before.
- The ad made 58% more interested in buying Colorado wine.
- Respondents in Metro Denver track with the total sample on these measures.

Seen ad before - 2016	Total N=500	Among Denver Metro N=280
Yes	13%	14%
No	87%	86%

Effect of ad - 2016	Total N=500	Among Denver Metro N=280
More interested in buying Colorado wines	58%	58%
The same	40%	41%
Less interested in buying Colorado wines	2%	1%

Q. 22,24 Have you seen either one of these advertisements – either on the Internet or on a billboard?
Q 23,25 Does this ad make you more interested, the same or less interested in buying Colorado wines?

Ad communication:

- 12% had seen this ad before.
- The ad made 62% more interested in buying Colorado wine.
- Respondents in Metro Denver track with the total sample on these measures.

Seen ad before - 2016	Total N=500	Among Denver Metro N=280
Yes	12%	13%
No	88%	87%

Effect of ad - 2016	Total N=500	Among Denver Metro N=280
More interested in buying Colorado wines	62%	65%
The same	36%	34%
Less interested in buying Colorado wines	2%	1%

Q. 22,24 Have you seen either one of these advertisements – either on the Internet or on a billboard?
Q 23,25 Does this ad make you more interested, the same or less interested in buying Colorado wines?

A closer look at…

Colorado Wine Drinkers

Demographics of Colorado wine drinkers:

Age, Education & Gender

- In 2016, n=314 of the 500 sample drink Colorado produced wine. Thus, many of the data for Colorado wine drinkers reflect the total sample.
- In this section of the report, only data that are different from the total – or insights relevant to Colorado wine drinkers vs. the total are called out.
- Older & educated - Colorado wine drinkers skew slightly older and more educated than the total sample of all wine drinkers that reside in Colorado.

AGE - 2016	Total Sample (n=500)	Colo Wine drinkers (n=314)
21-35	30%	27%
36-50	30%	28%
51-70	40%	45%

Education 2016	Total Sample (n=500)	Colo Wine drinkers (n=314)
Graduated high school	6%	4%
Some college	22%	19%
Graduated 2 year college	10%	8%
Graduated 4 year college	37%	42%
Post Graduate degree- masters or doctorate	25%	27%

Q. S1 What is your gender?
Q. S4 In which range does your age fall?
Q. S9. What is your highest level of education? (check one). Note – not asked in 2015.

Colorado wine drinkers:

Frequencies and Wine consumption geographies

- Drink more - Respondents that drink Colorado wine consume wine slightly more frequently than the total sample.
- Experimental & engaged in wine category - More of them also seem to consume wines from different regions vs. the total sample. More also tend to consume wine in multiple locations vs. the total (outdoors, home, restaurant, vacation, etc.).

How often drink wine - 2016	Total Sample (n=500)	Colo Wine drinkers (n=314)
Daily	8%	10%
More than once a week but not every day	38%	42%
Once a week	20%	20%
2-3 times/ mo.	23%	21%
Once a month	7%	5%
Special occasions/holidays	4%	2%

Where drink wine - 2016	Total Sample (n=500)	Colo Wine drinkers (n=314)
California	93%	95%
Oregon	33%	41%
Colorado	63%	100%
NY State	16%	20%
Washington State	35%	42%
Argentina	42%	50%
Spain	54%	59%
France	72%	79%
Italy	76%	81%
Slovenia	2%	3%
Australia	50%	61%
Idaho	2%	3%

Q.S6 On average, how often do you drink wine?

Q. 3 From which of the following geographic areas have you consumed wine? Check all that apply.

More frequent wine purchases:

- Among drinkers of Colorado wine, purchase of Colorado wine is slightly more frequent.
  - 36% of Colo. Wine drinkers purchase Colorado wine “a few times a year” vs. the total sample (26%).
  - 16% of Colo. Wine drinkers purchase Colorado wine “monthly” vs. 13% for the total sample.
  - In comparison to California wine purchases, Colorado wine drinkers mirror the total sample.

2016 - % wine drinkers	Have never purchased	Less than once a year	Around once a year	A few times a year	Monthly	Weekly
Colorado wine purchase– total sample (n=500)	21%	22%	14%	26%	13%	3%
Colorado wine purchase – among Colo. wine drinkers (n=314)	3%	24%	17%	36%	16%	3%
California wine purchase – total sample (n=500)	2%	4%	8%	45%	35%	7%
California wine - among Colo. Wine drinkers (n=314)	2%	4%	8%	45%	34%	7%

Q. 8 How often do you typically purchase wine from each of the following geographic areas? (check one timeframe that describes you best)

More interest in future purchase of Colo. wine:

- Among drinkers of Colorado wine, future purchase of Colorado wine is higher (75% Top 2 box) vs. the total sample(66%). Since this is among Co. wine drinkers, this shows strong interest in repeat purchase.
- In comparison, California wine future purchase interest is the same among Colorado wine drinkers and the total sample.

2016 - Future Purchase (5 pt. scale)	Definitely not buy	Probably not buy	May or may not buy	Probably will buy	Definitely will buy	Top 2 Box %
Colorado wine – total sample (n=500)	2%	6%	26%	34%	32%	66%
Colorado wine – among Colo. wine drinkers (n=314)	1%	5%	19%	35%	40%	75%
California wine – total sample (n=500)	0%	1%	10%	34%	55%	89%
California wine - among Colo. Wine drinkers (n=314)	0%	1%	9%	33%	56%	89%

Q. 9. In the future, how interested are you in purchasing wine from each of the following geographic areas?

Impressions of quality among drinkers of Colo. wine:

- More Colorado wine drinkers perceive CO wine to be above average in quality (57% top 2 box) vs. the total sample (46%).
- However, even among Colo. wine drinkers, California wine is believed to be high quality (80% top 2 box) vs. Colorado wine (57% top 2 box).

Quality	Very poor quality	Somewhat below average quality	Average quality	Somewhat above average quality	Very high quality
Colorado wine – 2016 total sample (n=500)	1%	11%	42%	33%	13%
Colorado wine – among Colo. wine drinkers (n=314)	1%	7%	35%	40%	17%
California wine – among Colo. Wine drinkers (n=314)	0%	1%	19%	37%	43%

- More of the drinkers of Colorado wine (64% top 2 box) believe it is improving vs. the total sample (57% top 2 box).

Changes in quality	Quality significantly declining	Quality somewhat declining	Quality staying about the same	Quality somewhat improving	Quality significantly improving
Colorado wine – 2016 total sample (n=500)	0%	3%	40%	43%	14%
Colorado wine – among Colo. wine drinkers (n=314)	0%	2%	34%	46%	18%

Q. 10 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.
Q. 11 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)

Impressions of price among drinkers of Colo. Wine:

- A few more of the Colorado wine drinkers believe Co. wine is over priced, but most believe its fairly priced (70%).

Value	Extremely underpriced	Somewhat underpriced	Fairly priced	Somewhat overpriced	Extremely overpriced
Colorado wine – 2016 total sample (n=500)	0%	3%	73%	21%	3%
Colorado wine – among Colo. wine drinkers (n=314)	0%	1%	70%	26%	3%

- Drinkers of Colorado wine expect to pay similar amounts $9 - $19.99 as the total sample.

Expect to Pay	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
Colorado wine – 2016 total sample (n=500)	6%	22%	35%	26%	8%	2%	1%
Colorado wine – among Colo. wine drinkers (n=314)	5%	20%	36%	27%	10%	2%	0%

Q. 12 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.
Q. 13 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? Check one in each row.

Wine purchase location among Co. wine drinkers:

- When comparing where respondents (who drink Colo. Wine) purchase wine, the largest share of purchase locations is at Neighborhood liquor stores (38% of wine is purchased here). The second largest wine purchase location is Large, Volume discount liquor stores – 21%. Similarly, those are the top 2 locations for purchasing Colorado wine.
- However, when asked where they'd expect to buy Colorado, wine, multiple retail outlets make the list, yet, Colorado wine is not currently being bought at these locations.

CO wine purchasers 2016 (n=314)	Expect to buy CO Wine (check all that apply)	Where buy Wine (% share of wine purchases)	Where buy CO. Wine (% share of wine purchases)
Neighborhood liquor store	77%	38%	36%
Wine specialty shop	68%	7%	8%
Large, volume discount liquor store	57%	21%	16%
Grocery store that sells wine	31%	6%	4%
Restaurants	53%	12%	10%
Bars	37%	6%	4%
Farmer's markets	40%	1%	3%
Winery or wine tasting room	70%	4%	13%
At a sport or concert venue	15%	1%	0%
Internet	25%	3%	1%
Other	1%	2%	4%

Q. 4 What percent of all the wine you bought, during the last year or so, was from the following retail locations? If you don't buy wine at a location, please enter "0".
Q 14 What percent of all the **Colorado wine** you consumed or bought, during the last year or so, was from the following locations? If you don't buy wine at a location, please enter "0".
Q. 16 Where would you expect to buy **Colorado wines?** (check all that apply)

COLORADO
A BEAUTIFUL STATE OF
WINE

A closer look at…

Frequent wine drinkers - Weekly and more often

Weekly wine drinkers spend more for wine:

- The majority of weekly+ wine drinkers spend \$12-\$19.99, whereas, the majority of the less than weekly wine drinkers spend \$9-\$14.99 per bottle.

Expect to Pay	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
Weekly Wine drinkers (n=334)	10%	19%	32%	26%	9%	3%	1%
Less than weekly (n=166)	10%	27%	38%	13%	8%	3%	1%

- And weekly+ wine drinkers consume wine in multiple locations – more so vs. the total sample and less than weekly drinkers.

Top occasions for wine consumption	Home relaxing	Holiday / special occasion	Vacation	Restaurant	Home entertaining
Total Sample (n=500)	75%	84%	71%	78%	74%
Weekly Wine drinkers (n=334)	80%	87%	77%	80%	79%
Less than weekly (n=166)	65%	78%	58%	75%	65%

Q. 5 How much do you typically spend on a standard (750 ml) bottle of wine at a liquor store or wine shop?
Q. 7 At which of the following occasions have you consumed wine over the last year or so?

Impressions of quality among weekly wine drinkers:

- Slightly more weekly+ wine drinkers perceive Colorado wine to be somewhat or very high quality vs. the total sample.

Quality	Very poor quality	Somewhat below average quality	Average quality	Somewhat above average quality	Very high quality
Colorado wine – 2016 total sample (n=500)	1%	11%	42%	33%	13%
Colorado wine – among weekly wine drinkers (n=334)	1%	10%	40%	33%	16%
Colorado wine – among less than weekly wine drinkers (n=314)	2%	13%	45%	31%	9%

- More of the drinkers of Colorado wine (64% top 2 box) believe it is improving vs. the total sample (57% top 2 box).

Changes in quality	Quality significantly declining	Quality somewhat declining	Quality staying about the same	Quality somewhat improving	Quality significantly improving
Colorado wine – 2016 total sample (n=500)	0%	3%	40%	43%	14%
Colorado wine – among Colo. wine drinkers (n=314)	0%	2%	34%	46%	18%

Q. 10 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.
Q. 11 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)

More weekly wine drinkers purchase Colorado wine:

- 47% of weekly+ wine purchasers buy Colorado wine more than annually; 42% for total.
- 18% have never purchased Colorado wine vs. 28% for less than weekly drinkers.

2016 - % wine drinkers	Have never purchased	Less than once a year	Around once a year	A few times a year	Monthly	Weekly
Colorado wine purchase– total sample (n=500)	21%	22%	14%	26%	13%	3%
Colorado wine purchase – among weekly wine drinkers (n=334)	18%	20%	15%	28%	15%	4%
Colorado wine purchase – among less than weekly wine drinkers (n=166)	28%	26%	13%	24%	9%	1%

Q. 8 How often do you typically purchase wine from each of the following geographic areas? (check one timeframe that describes you best)

Note – all other weekly wine drinker data mirror the total sample.

Summary of 2016 Data breaks by subgroups:

- Age
- Gender
- Weekly +
- CO wine drinkers
- Denver Metro wine purchasers
- Hard Cider and Wine drinkers

Wine consumption frequency by subgroup:

- 70% of males consume wine weekly or more frequently vs. 65% for females.
- 70% of hard cider drinkers consume wine weekly or more often.
- More older, 51-70 consumers consume wine more frequently (70% weekly and more often).
- Hard cider drinkers skew younger (43% are 21-35 & 39% are 36-50) as well as female (65%) – thus, hard cider scores track with younger and female respondents.

Sub Group wine consumption frequency 2016 n=500)	Daily	More than once a week but not every day	Once a week	2-3 times per month	Once a month	Special Occasions or holidays only
TOTAL SAMPLE (n=500)	8%	38%	20%	23%	7%	4%
Frequent wine drinkers /weekly+ (n=334)	13%	57%	31%	na	na	na
Males (n=200)	6%	40%	24%	24%	5%	2%
Females (n=300)	10%	37%	18%	22%	8%	5%
Denver Metro (n=280)	8%	38%	21%	26%	4%	2%
Colo Wine Drinkers (n=314)	10%	42%	20%	21%	5%	2%
Consumed Hard Cider (n=120)	8%	42%	20%	20%	11%	8%
21-35 (n=150)	5%	31%	22%	26%	12%	3%
36-50 (n=150)	9%	39%	23%	16%	7%	5%
51-70 (n=200)	10%	42%	18%	26%	2%	3%

Q.S6 On average, how often do you drink wine?

Awareness vs. consumed by subgroup:

- Colorado wines have lower awareness & consumption among the younger 21-35 subgroup.
- California wines have strong awareness to "ever consumed" conversion rates among all subgroups. Awareness for California wine is in the 91%+ levels among all subgroups. Ever consumed for California wine is also in the 92%+ for most groups – the exception is the 21-35 – 85% ever consumed.
- French wines have strong awareness, but conversion to consumption drops among females (92% to 66%) and younger aged wine drinkers (88% to 63%).

Awareness of Wine	Colorado	California	France
TOTAL SAMPLE (n=500)	73%	96%	93%
Frequent wine drinkers /weekly+ (n=334)	79%	96%	94%
Males (n=200)	79%	96%	94%
Females (n=300)	70%	97%	92%
Denver Metro (n=280)	76%	95%	93%
Colo Wine Drinkers (n=314)	100%	98%	96%
Consumed Hard Cider (n=120)	72%	96%	94%
21-35 (n=150)	62%	91%	88%
36-50 (n=150)	67%	99%	93%
51-70 (n=200)	87%	99%	76%

Ever Consumed	Colorado	California	France
TOTAL SAMPLE (n=500)	63%	93%	72%
Frequent wine drinkers /weekly+ (n=334)	67%	93%	75%
Males (n=200)	66%	94%	81%
Females (n=300)	61%	92%	66%
Denver Metro (n=280)	65%	92%	74%
Colo Wine Drinkers (n=314)	100%	95%	79%
Consumed Hard Cider (n=120)	68%%	93%	74%
21-35 (n=150)	57%	85%	63%
36-50 (n=150)	58%	94%	73%
51-70 (n=200)	71%	98%	78%

Q. 2. From which of the following geographic areas have you ever heard of wine being produced?
Q 3 From which of the following geographic areas ***have you ever consumed*** wine from?

Future PI – CO wine purchase:

- Overall, future purchase intent for Colorado wine is high among all sub groups; conversely rejection (bottom 2 box) is relatively low.
- Of note, 79% (top 2 box) of younger 21-35 wine drinkers state interest in purchasing Colorado wine in the future. This is significantly higher vs. the total sample 66%.

CO Wine – future purchase interest	Definitely will not buy	Probably will not buy	Might or might not buy	Probably will buy	Definitely will buy
TOTAL SAMPLE (n=500)	2%	6%	26%	34%	32%
Frequent wine drinkers /weekly+ (n=334)	1%	6%	24%	34%	34%
Males (n=200)	3%	7%	30%	34%	28%
Females (n=300)	1%	6%	23%	34%	36%
Denver Metro (n=280)	2%	5%	28%	36%	29%
Colo Wine Drinkers (n=314)	1%	5%	19%	35%	40%
Consumed Hard Cider (n=120)	0%	2%	22%	34%	43%
21-35 (n=150)	2%	3%	17%	39%	40%
36-50 (n=150)	3%	4%	27%	32%	34%
51-70 (n=200)	1%	11%	32%	32%	26%

Q. 9 In the future, how interested are you in purchasing wine from each of the following geographic areas?

Spend on bottle by subgroup:

- Spending by subgroup does not show too many differences. The exception is among the 51-70 age, who are more likely to spend less.
- Only 17% of the 51-70 age group are willing to spend $15 - $19.99/bottle vs. 26% (ages 21-35) and 24% (ages 36-50).

Expect to Pay	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
Colorado wine – 2016 total sample (n=500)	6%	22%	35%	26%	8%	2%	1%
Frequent wine drinkers /weekly+ (n=334)	10%	19%	32%	26%	9%	3%	1%
Males (n=200)	9%	19%	33%	26%	8%	6%	1%
Females (n=300)	10%	24%	35%	19%	9%	2%	1%
Denver Metro (n=280)	9%	20%	38%	20%	9%	4%	1%
Colo Wine Drinkers (n=314)	5%	20%	36%	27%	10%	2%	0%
Consumed Hard Cider (n=120)	8%	24%	33%	22%	10%	2%	1%
21-35 (n=150)	5%	23%	29%	26%	11%	4%	1%
36-50 (n=150)	7%	17%	37%	24%	10%	4%	1%
51-70 (n=200)	16%	24%	36%	17%	6%	2%	1%

Q 5 How much do you typically spend on a standard (750 ml) bottle of wine at a liquor store or wine shop?

Wine occasions by subgroup:

- Most occasions are similar in terms of participation by respondent subgroup.
- Deviations from the average include:
  - 51-70 wine use at home while cooking – 55% - lower than average.
  - Males - outdoor/ BBQ usage – 37% - lower than average.
  - Younger 21-35 – friend's house for meal – higher than average.

Occasions	At home while cooking	Home - While entertaining guests	At home alone, while relaxing, reading or some activity w/o food	At a restaurant before or with a meal	At a friend's house for a meal or party	For a holiday meal or special occasion	As a gift for a co-worker or friend	Outdoors, at a picnic or BBQ	While on Vacation
Colorado wine – 2016 total sample (n=500)	64%	74%	75%	78%	68%	84%	32%	39%	71%
Frequent wine drinkers /weekly+ (n=334)	70%	79%	80%	80%	71%	87%	35%	45%	77%
Males (n=200)	67%	79%	72%	79%	71%	84%	33%	37%	70%
Females (n=300)	62%	71%	77%	78%	66%	84%	32%	41%	72%
Denver Metro (n=280)	64%	74%	74%	79%	72%	84%	36%	43%	71%
Colo Wine Drinkers (n=314)	67%	78%	76%	81%	72%	88%	35%	45%	77%
Consumed Hard Cider (n=120)	69%	78%	83%	85%	73%	88%	40%	48%	77%
21-35 (n=150)	68%	75%	79%	79%	73%	82%	33%	39%	71%
36-50 (n=150)	71%	79%	81%	79%	66%	85%	33%	38%	68%
51-70 (n=200)	55%	71%	68%	77%	65%	84%	31%	41%	73%

Q. 7 At which of the following occasions have you consumed wine over the last year or so? (check all that apply)

Frequency – CO wine purchase:

- More hard cider drinkers purchase Colorado wine – 28% monthly or weekly vs. the total 16%.
- Among drinkers of Colorado wine, 55% purchase CO wine a few times a year or more frequently.

CO wine purchase frequency	Never have purchased	Less than once a year	Around once a year	A few times a year	Monthly	Weekly
Colorado wine – 2016 total sample (n=500)	21%	22%	14%	26%	13%	3%
Frequent wine drinkers / weekly+ (n=334)	3%	24%	17%	36%	16%	3%
Males (n=200)	17%	23%	16%	25%	16%	3%
Females (n=300)	24%	22%	13%	27%	11%	3%
Denver Metro (n=280)	23%	22%	14%	25%	13%	4%
Colo Wine Drinkers (n=314)	3%	24%	17%	36%	16%	3%
Consumed Hard Cider (n=120)	17%	16%	9%	30%	24%	4%
21-35 (n=150)	22%	14%	15%	24%	19%	6%
36-50 (n=150)	22%	20%	9%	30%	15%	3%
51-70 (n=200)	20%	30%	18%	25%	7%	1%

Q 8. How often do you typically purchase wine from each of the following geographic areas? Colorado

Quality impressions – CO wine:

- Quality of Colorado wine is seen to be as average among most in each subgroup.
- The exception is among Hard Cider drinkers and those that have consumed Colorado wine – a slightly higher percent believe CO wine is "somewhat above average" and 19% of hard cider drinkers believe it to be "very high quality."

CO Wine – Quality of wine	Very poor quality	Somewhat below average quality	Average quality	Somewhat above average quality	Very high quality
TOTAL SAMPLE (n=500)	1%	11%	42%	33%	13%
Frequent wine drinkers /weekly+ (n=334)	1%	10%	40%	33%	16%
Males (n=200)	1%	14%	41%	34%	11%
Females (n=300)	2%	8%	43%	32%	15%
Denver Metro (n=280)	1%	11%	44%	31%	13%
Colo Wine Drinkers (n=314)	1%	7%	35%	40%	17%
Consumed Hard Cider (n=120)	0%	6%	40%	35%	19%
21-35 (n=150)	1%	7%	45%	30%	17%
36-50 (n=150)	1%	13%	44%	30%	12%
51-70 (n=200)	2%	12%	38%	37%	12%

Q 10 Select the statement that best describes your opinion and impression regarding the **quality of wines** from each of the following geographic areas.

Price impressions – CO wine:

- The majority in each subgroup believe CO wine is fairly priced.
- However, among weekly +, 51-70 and those that have consumed CO wine – around one quarter believe it's somewhat over priced.

CO Wine – price for the quality of wine	Extremely under priced	Somewhat under priced	Fairly priced	Somewhat over priced	Extremely over priced
TOTAL SAMPLE (n=500)	0%	3%	73%	21%	3%
Frequent wine drinkers /weekly+ (n=334)	0%	1%	70%	24%	4%
Males (n=200)	0%	3%	71%	22%	5%
Females (n=300)	1%	3%	74%	20%	2%
Denver Metro (n=280)	0%	3%	74%	20%	3%
Colo Wine Drinkers (n=314)	0%	1%	70%	26%	3%
Consumed Hard Cider (n=120)	0%	2%	73%	23%	2%
21-35 (n=150)	1%	5%	72%	18%	4%
36-50 (n=150)	0%	1%	77%	18%	4%
51-70 (n=200)	1%	3%	70%	25%	2%

Q 12 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.

Colorado wine % of total purchase:

- In terms of "share of throat," Colorado wines make up a very small percent of all the wine each subgroup's purchases. More than 50% allocate less than 10% to Colorado wines.
- Hard cider drinkers and younger wine drinkers allocate a slightly larger shares to Colorado wines vs. other subgroups.

Share of purchase for Co wine.	More than 50% of my wine purchases are Colorado wine–	25% to 49%	20% to 24%	10% to 19%	1% to 9%	Less than 1% of my wine purchases are Colorado wine–	I do not purchase Colorado wine
TOTAL SAMPLE (n=500)	6%	12%	9%	16%	31%	21%	5%
Frequent wine drinkers /weekly+ (n=334)	6%	10%	10%	17%	30%	22%	5%
Males (n=200)	7%	8%	11%	16%	33%	21%	5%
Females (n=300)	5%	15%	8%	16%	29%	21%	5%
Denver Metro (n=280)	5%	12%	10%	17%	30%	20%	6%
Colo Wine Drinkers (n=314)	6%	12%	9%	16%	31%	21%	5%
Consumed Hard Cider (n=120)	10%	18%	11%	22%	24%	13%	1%
21-35 (n=150)	8%	15%	15%	27%	25%	7%	2%
36-50 (n=150)	6%	18%	11%	11%	28%	18%	7%
51-70 (n=200)	5%	7%	4%	12%	36%	30%	6%

Q. 18 What percentage of your overall wine purchases would you estimate is Colorado wine?

Stronger performing attributes for CO wine:

- Stronger scoring attributes with scores above 4.00 mean (on 5 pt. scale) are shown in the chart below.
- Many subgroups are positive on "local wine tasting, winery visits and local restaurants."
- There's also a positive outlook with strong scores for "future growth potential and quality wines made in CO."
- This holds true for most subgroups. The exceptions are males and the older 51-70 demo, where several attribute scores are average.

Attributes – mean scores	Restaurants that feature locally grown food should also feature local wines	I think the Colorado wine industry has potential for future growth	Like to buy CO and support local growers	Interest in visiting CO wineries	Interest in CO wine tasting events	Like to experiment/ taste wine from different regions	Believe there are quality wines made in CO.
TOTAL SAMPLE (n=500)	4.18	4.13	4.09	4.01	3.92	4.12	3.93
Frequent wine drinkers /weekly+ (n=334)	4.22	4.17	4.09	4.09	4.01	4.22	4.00
Males (n=200)	4.10	4.06	3.96	3.86	3.79	4.07	3.95
Females (n=300)	4.23	4.18	4.17	4.11	4.01	4.16	3.92
Denver Metro (n=280)	4.18	4.09	4.05	3.95	3.89	4.11	3.89
Colo Wine Drinkers (n=314)	4.27	4.28	4.19	4.11	3.98	4.20	4.14
Consumed Hard Cider (n=120)	4.37	4.32	4.21	4.31	4.29	4.29	4.13
21-35 (n=150)	4.31	4.17	4.26	4.28	4.23	4.19	4.04
36-50 (n=150)	4.25	4.09	4.15	4.01	3.93	4.19	3.91
51-70 (n=200)	4.02	4.13	3.91	3.81	3.68	4.02	3.88

Q. 19 What are your opinions and impressions of **Colorado wines?** Check below how much you agree or disagree with each statement.

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Thank you.