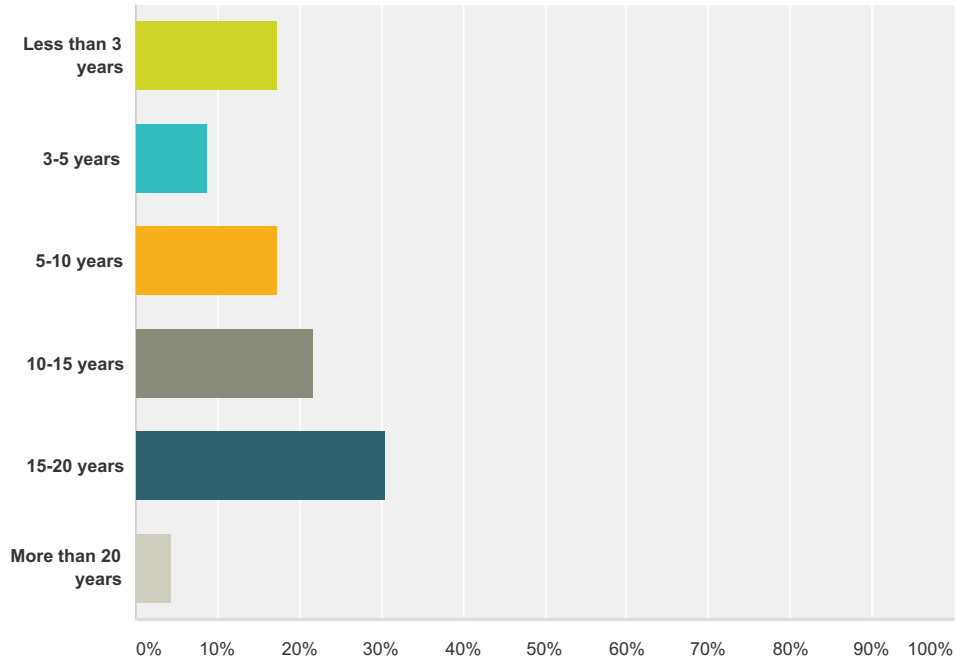


Q1 How many years have you been involved with the Colorado wine industry?

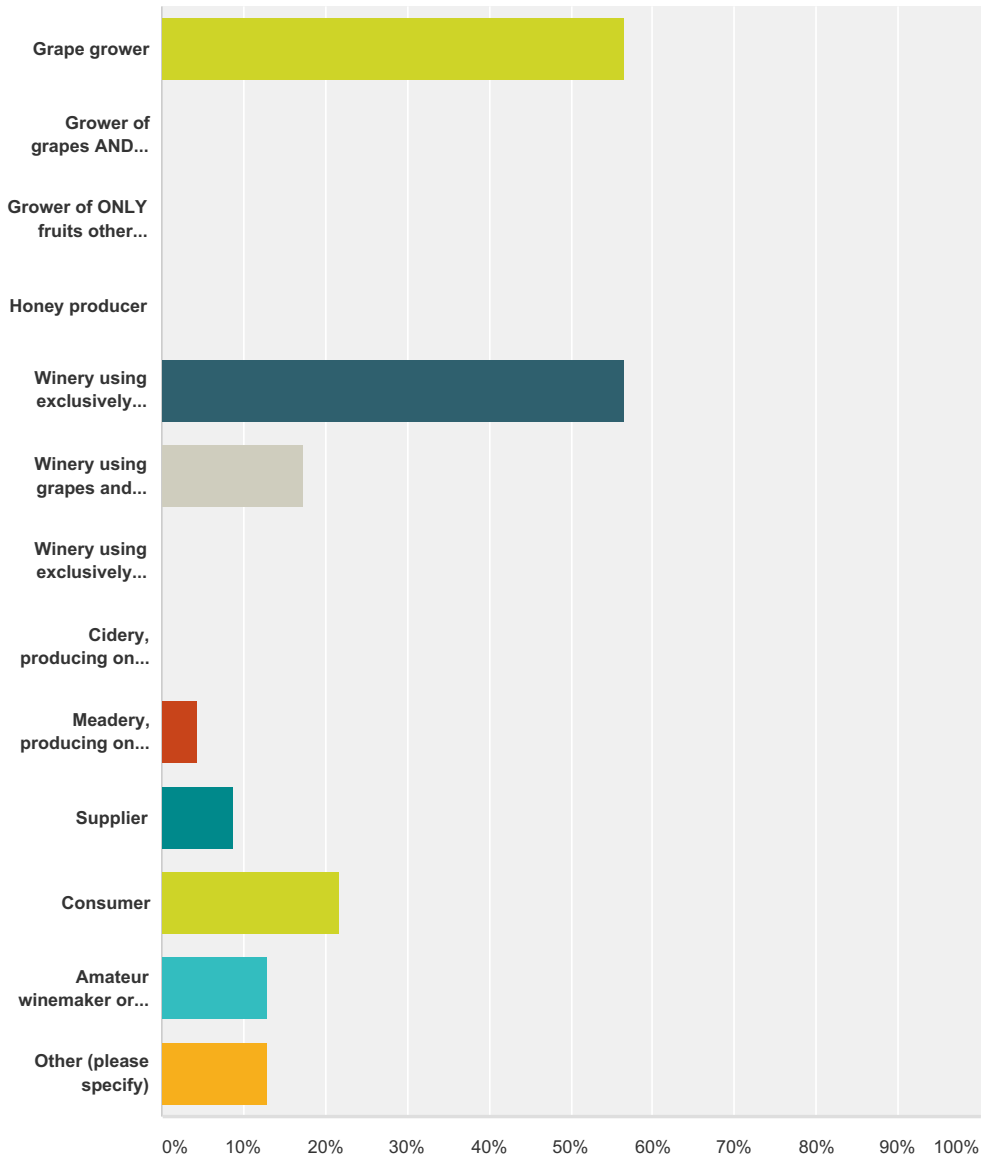
Answered: 23 Skipped: 0



| Answer Choices | Responses |
|--------------------|-----------|
| Less than 3 years | 17.39% 4 |
| 3-5 years | 8.70% 2 |
| 5-10 years | 17.39% 4 |
| 10-15 years | 21.74% 5 |
| 15-20 years | 30.43% 7 |
| More than 20 years | 4.35% 1 |
| Total | 23 |

Q2 What is your role within the Colorado wine or grape-growing industry? Please check all that apply. If you are an amateur winemaker, grape and fruit grower or honey producer, meaning you do not sell your products on the commercial market, please check amateur below.

Answered: 23 Skipped: 0



| Answer Choices | Responses |
|---|-----------|
| Grape grower | 56.52% 13 |
| Grower of grapes AND other fruits used for wine | 0.00% 0 |
| Grower of ONLY fruits other than grapes used to make wine | 0.00% 0 |

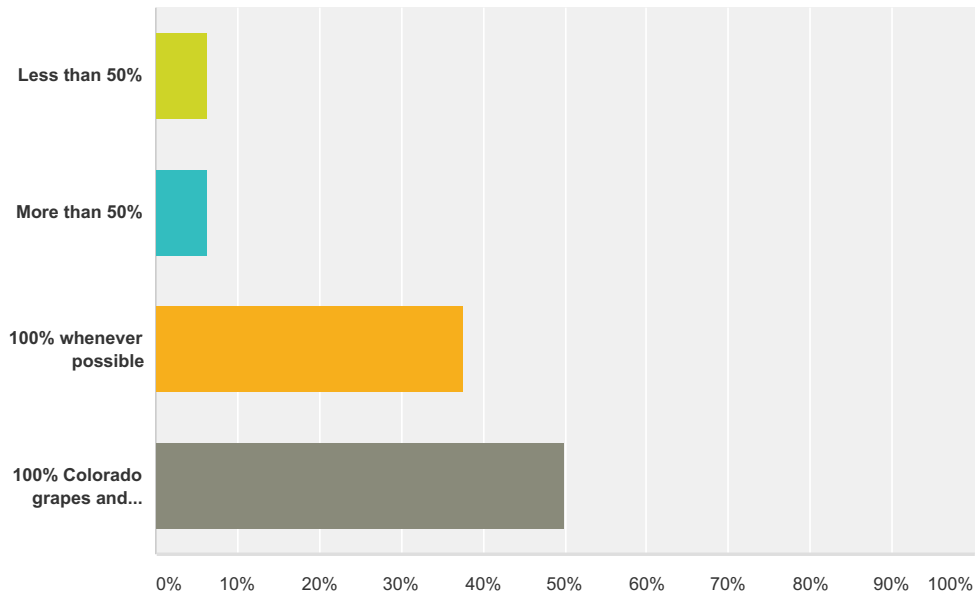
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| | | |
|--|--------|----|
| Honey producer | 0.00% | 0 |
| Winery using exclusively grapes | 56.52% | 13 |
| Winery using grapes and other fruit, including honey, to make wine | 17.39% | 4 |
| Winery using exclusively produce other than grapes to make wine | 0.00% | 0 |
| Cidery, producing only cider and/or perry | 0.00% | 0 |
| Meadery, producing only mead | 4.35% | 1 |
| Supplier | 8.70% | 2 |
| Consumer | 21.74% | 5 |
| Amateur winemaker or grape-grower | 13.04% | 3 |
| Other (please specify) | 13.04% | 3 |
| Total Respondents: 23 | | |

| # | Other (please specify) | Date |
|---|-------------------------------|-------------------|
| 1 | educator/researcher | 2/1/2016 12:15 PM |
| 2 | grapes and apples... no honey | 2/1/2016 11:04 AM |
| 3 | Real Estate | 1/29/2016 4:22 PM |

Q3 In an optimal harvest, does more or less than 50% of the grapes or other agricultural produce, such as honey or juice, that your winery uses to make wine come from Colorado growers?

Answered: 16 Skipped: 7

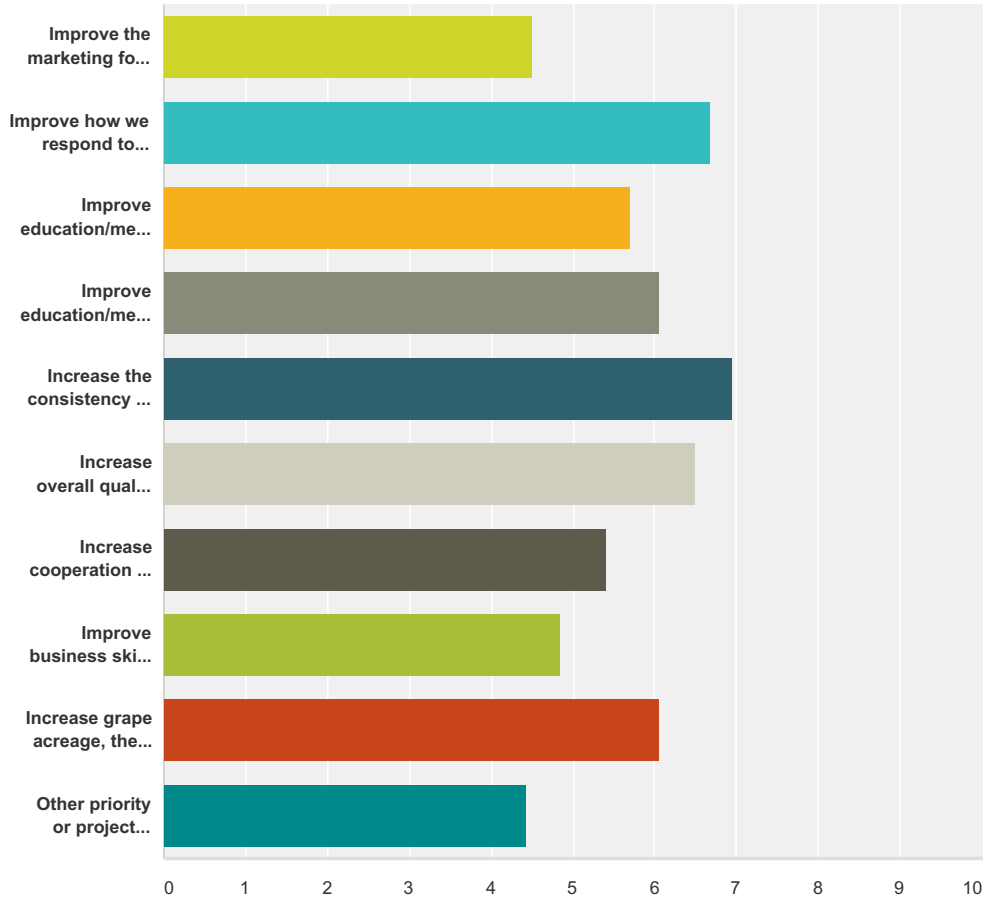


| Answer Choices | Responses | |
|--|-----------|-----------|
| Less than 50% | 6.25% | 1 |
| More than 50% | 6.25% | 1 |
| 100% whenever possible | 37.50% | 6 |
| 100% Colorado grapes and produce exclusively | 50.00% | 8 |
| Total | | 16 |

Q4 The following are potential industry priorities and projects that have been discussed in previous years or are currently underway. Please rank these topics according to your sense of which is the most important (1) to least important (10) for improving the Colorado wine industry. If you do not think that a topic or goal listed here will improve our industry or is not worthy of monetary and energy investment, please check "N/A." To assign a rank, you can drag and drop the item into the position in which you wish to rank it. Or, you can use the pull-down menus to assign a ranking. Be aware that when you use the pull-down menus Survey Monkey will automatically assign rankings to all the other answers and rapidly reorder the entire list. Although this will maintain the ranks you have assigned, it will also--and rather confusingly--move and reorder the items you have not yet assigned. So don't be surprised when these items jump around your screen after you rank the first one. Dragging and dropping the items into your preferred order may be less confusing.

Answered: 20 Skipped: 3

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| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | N/A | Total | Score |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|------------|------------|-------|-------|
| Improve the marketing for Colorado wines by doing more consumer research | 0.00% 0 | 0.00% 0 | 5.00% 1 | 15.00% 3 | 15.00% 3 | 10.00% 2 | 20.00% 4 | 20.00% 4 | 10.00% 2 | 5.00% 1 | 0.00% 0 | 20 | 4.50 |
| Improve how we respond to Colorado's climate and weather issues | 15.00% 3 | 15.00% 3 | 15.00% 3 | 10.00% 2 | 5.00% 1 | 10.00% 2 | 10.00% 2 | 10.00% 2 | 5.00% 1 | 0.00% 0 | 5.00% 1 | 20 | 6.68 |
| Improve education/methods/skills level for winemakers | 10.00% 2 | 5.00% 1 | 15.00% 3 | 10.00% 2 | 5.00% 1 | 20.00% 4 | 15.00% 3 | 10.00% 2 | 5.00% 1 | 5.00% 1 | 0.00% 0 | 20 | 5.70 |
| Improve education/methods/skills level for grape and fruit growers | 0.00% 0 | 15.00% 3 | 20.00% 4 | 20.00% 4 | 15.00% 3 | 0.00% 0 | 5.00% 1 | 15.00% 3 | 5.00% 1 | 5.00% 1 | 0.00% 0 | 20 | 6.05 |
| Increase the consistency and quality of Colorado grapes | 10.00% 2 | 25.00% 5 | 15.00% 3 | 15.00% 3 | 10.00% 2 | 0.00% 0 | 5.00% 1 | 0.00% 0 | 15.00% 3 | 0.00% 0 | 5.00% 1 | 20 | 6.95 |
| Increase overall quality of winemaking | 25.00% 5 | 15.00% 3 | 0.00% 0 | 10.00% 2 | 10.00% 2 | 15.00% 3 | 5.00% 1 | 5.00% 1 | 10.00% 2 | 5.00% 1 | 0.00% 0 | 20 | 6.50 |
| Increase cooperation and communication within the industry, especially during harvest/crush | 10.00% 2 | 15.00% 3 | 0.00% 0 | 10.00% 2 | 0.00% 0 | 25.00% 5 | 10.00% 2 | 15.00% 3 | 10.00% 2 | 5.00% 1 | 0.00% 0 | 20 | 5.40 |

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| | | | | | | | | | | | | | |
|--|-------------|------------|-------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|----|------|
| Improve business skills and support outside the scope of winemaking or grapegrowing | 5.00% 1 | 5.00% 1 | 5.00% 1 | 5.00% 1 | 20.00% 4 | 5.00% 1 | 15.00% 3 | 15.00% 3 | 20.00% 4 | 0.00% 0 | 5.00% 1 | 20 | 4.84 |
| Increase grape acreage, the volume of production and/or capital investment in the industry | 5.00% 1 | 5.00% 1 | 25.00% 5 | 5.00% 1 | 15.00% 3 | 10.00% 2 | 15.00% 3 | 0.00% 0 | 5.00% 1 | 5.00% 1 | 10.00% 2 | 20 | 6.06 |
| Other priority or project (please specify in the next question) | 20.00% 4 | 0.00% 0 | 0.00% 0 | 0.00% 0 | 5.00% 1 | 5.00% 1 | 0.00% 0 | 5.00% 1 | 5.00% 1 | 30.00% 6 | 30.00% 6 | 20 | 4.43 |

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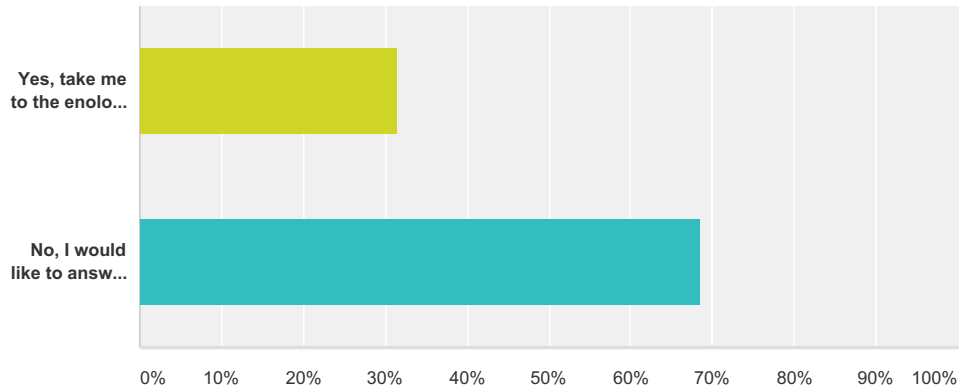
Q5 What other priority or priorities for research, whether it is viticulture, enology, consumer or marketing, would you like to add to the list above?

Answered: 6 Skipped: 17

| # | Responses | Date |
|---|---|--------------------|
| 1 | Improve the marketing of Colorado grapes will become much more important, particularly if 2016 does not sustain weather damage. Providing marketing assistance for Colorado wineries (provide information to identify new markets, out-of-state) is also important. | 2/24/2016 3:49 PM |
| 2 | Cold hardy cultivars--making wine from them, blending, etc. | 2/24/2016 8:56 AM |
| 3 | none | 1/31/2016 10:17 AM |
| 4 | Find our best suited (for growing/winemaking) grape varieties! Also, crown gall control. | 1/30/2016 2:19 PM |
| 5 | Look for outside state agencies to validate all research performed. | 1/29/2016 8:54 PM |
| 6 | Consider the significant amount of research in grape growing and wine production that is being conducted and totally ignored by CSU | 1/29/2016 5:20 PM |

Q6 Would you like to skip the viticulture questions, if they do not apply to you or your business?

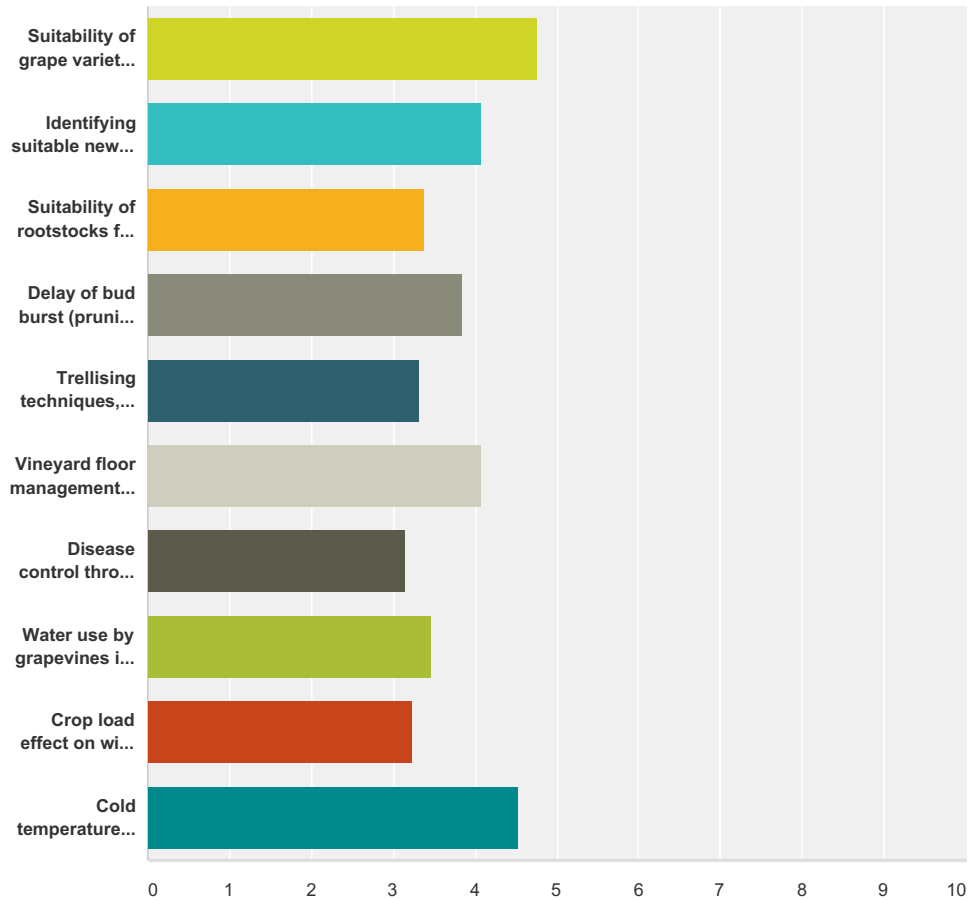
Answered: 19 Skipped: 4



| Answer Choices | Responses | |
|---|-----------|-----------|
| Yes, take me to the enology research questions. | 31.58% | 6 |
| No, I would like to answer the questions about viticultural research. | 68.42% | 13 |
| Total | | 19 |

Q7 The following are viticultural research projects and topics that are currently under way or recently completed. Please rate each project or topic as to how important you think it is for the entire Colorado wine and grape industry, from totally unimportant on the left to extremely important on the right.

Answered: 13 Skipped: 10



| | Totally unimportant. Irrelevant for the CO industry. | Somewhat unimportant. Discontinue this research. | Importance uncertain with little apparent benefit to the industry. Could be discontinued. | Importance uncertain, but may have some benefit to the industry. Should be continued. | Somewhat important. Need more research but not top priority. | Extremely important. Definitely continue this research as a top priority | Total | Weighted Average |
|--|--|--|---|---|--|--|-------|------------------|
| Suitability of grape varieties for Colorado (cropping reliability, cold hardiness) | 0.00% 0 | 0.00% 0 | 0.00% 0 | 7.69% 1 | 7.69% 1 | 84.62% 11 | 13 | 4.77 |
| Identifying suitable new growing areas to expand grape production | 0.00% 0 | 0.00% 0 | 0.00% 0 | 38.46% 5 | 15.38% 2 | 46.15% 6 | 13 | 4.08 |

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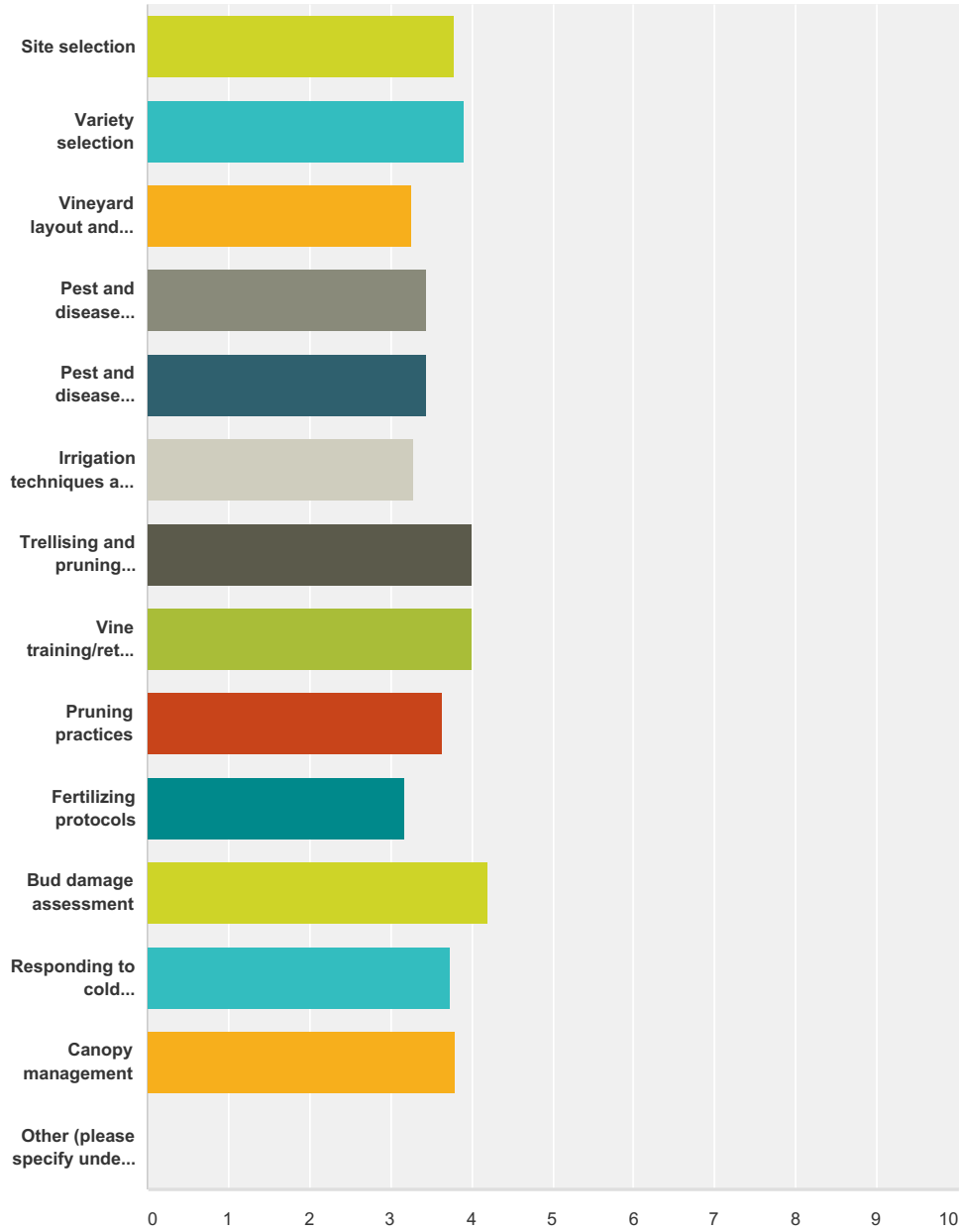
| | | | | | | | | |
|--|-------------------|-------------------|--------------------|--------------------|--------------------|--------------------|----|------|
| Suitability of rootstocks for Colorado (cropping reliability, yield, cold hardiness) | 7.69% 1 | 0.00% 0 | 7.69% 1 | 38.46% 5 | 23.08% 3 | 23.08% 3 | 13 | 3.38 |
| Delay of bud burst (pruning timing and/or other methods) | 0.00% 0 | 0.00% 0 | 0.00% 0 | 38.46% 5 | 38.46% 5 | 23.08% 3 | 13 | 3.85 |
| Trellising techniques, such as quadrilateral (maintaining yield) | 0.00% 0 | 7.69% 1 | 15.38% 2 | 30.77% 4 | 30.77% 4 | 15.38% 2 | 13 | 3.31 |
| Vineyard floor management including soil and irrigation (maintaining yield) | 0.00% 0 | 0.00% 0 | 7.69% 1 | 7.69% 1 | 53.85% 7 | 30.77% 4 | 13 | 4.08 |
| Disease control through reduced use of toxic substances, such as powdery mildew spray regimens | 0.00% 0 | 0.00% 0 | 30.77% 4 | 30.77% 4 | 30.77% 4 | 7.69% 1 | 13 | 3.15 |
| Water use by grapevines in the CO climate (irrigation techniques) | 0.00% 0 | 0.00% 0 | 23.08% 3 | 30.77% 4 | 23.08% 3 | 23.08% 3 | 13 | 3.46 |
| Crop load effect on wine quality | 0.00% 0 | 7.69% 1 | 23.08% 3 | 15.38% 2 | 46.15% 6 | 7.69% 1 | 13 | 3.23 |
| Cold temperature injury mitigation and avoidance | 0.00% 0 | 0.00% 0 | 0.00% 0 | 7.69% 1 | 30.77% 4 | 61.54% 8 | 13 | 4.54 |

| # | Comment on any of the above research projects. | Date |
|---|---|-------------------|
| 1 | The continuing viticulture research being done by CSU is absolutely essential. Work on cold hardiness, irrigation, and trellis techniques are especially excellent and highly valuable. | 2/24/2016 9:06 AM |
| 2 | Finding crown gall treatments would improve yeilds, quality, longevity in vineyards; should be a top priority. The recent & scary arrival of Phyloxera in CO (front range) would move the rootstock research up to high priority if it starts spreading. By the way, THAT VINEYARD SHOULD BE RIPPED OUT NOW! during cold weather to protect our industry & investigated as to how that bug got there! Where is CSU & CO Dept of Ag on that? Ultra top priority!!!! | 1/30/2016 2:39 PM |
| 3 | The final topic mentioned has very broad implications and should be well expanded beyond the current efforts mentioned in the first topic, which has been talked about to the point of asking the question, "What else is the rest of the wine growing world doing for cold weather mitigation?" | 1/29/2016 5:25 PM |
| 4 | A key deficiency in Colorado viticulture is the wild year to year variation in crop size, quality, and juice characteristics. Most of this viability is due to one or more of several types of cold damage. Any research into prevention, avoidance, mitigation, or recovery from mid winter cold damage or spring frost damage is crucial. | 1/16/2016 2:38 PM |

Q8 How valuable--in terms of monetary savings, immediate returns or increased quality and efficiency--do you feel the information you have received from CSU's Viticulture Research Program has been to your operation for each of the following topics? The information may have come through personal consultation with the State Viticulturist, public seminars or from on-line/printed materials.If your business has no viticultural functions, please skip this question. If a particular topic does not apply to you, please select "N/A."

Answered: 11 Skipped: 12

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| | Of no value whatsoever | Of little value | Somewhat valuable | Very valuable | Extremely valuable | N/A | Total | Weighted Average |
|---|------------------------|-----------------|-------------------|---------------|--------------------|-------------|-------|------------------|
| Site selection | 9.09% 1 | 0.00% 0 | 27.27% 3 | 9.09% 1 | 36.36% 4 | 18.18% 2 | 11 | 3.78 |
| Variety selection | 9.09% 1 | 0.00% 0 | 9.09% 1 | 45.45% 5 | 27.27% 3 | 9.09% 1 | 11 | 3.90 |
| Vineyard layout and design | 9.09% 1 | 9.09% 1 | 27.27% 3 | 9.09% 1 | 18.18% 2 | 27.27% 3 | 11 | 3.25 |
| Pest and disease identification | 9.09% 1 | 9.09% 1 | 27.27% 3 | 36.36% 4 | 18.18% 2 | 0.00% 0 | 11 | 3.45 |
| Pest and disease protection or mitigation | 9.09% 1 | 0.00% 0 | 45.45% 5 | 27.27% 3 | 18.18% 2 | 0.00% 0 | 11 | 3.45 |
| Irrigation techniques and issues | 9.09% 1 | 9.09% 1 | 36.36% 4 | 36.36% 4 | 9.09% 1 | 0.00% 0 | 11 | 3.27 |
| Trellising and pruning techniques | 0.00% 0 | 9.09% 1 | 18.18% 2 | 27.27% 3 | 36.36% 4 | 9.09% 1 | 11 | 4.00 |

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| | | | | | | | | |
|---------------------------------------|-------------|------------|-------------|-------------|-------------|--------------|----|------|
| Vine training/retraining | 0.00% 0 | 9.09% 1 | 9.09% 1 | 54.55% 6 | 27.27% 3 | 0.00% 0 | 11 | 4.00 |
| Pruning practices | 0.00% 0 | 9.09% 1 | 36.36% 4 | 36.36% 4 | 18.18% 2 | 0.00% 0 | 11 | 3.64 |
| Fertilizing protocols | 18.18% 2 | 9.09% 1 | 18.18% 2 | 45.45% 5 | 9.09% 1 | 0.00% 0 | 11 | 3.18 |
| Bud damage assessment | 0.00% 0 | 0.00% 0 | 30.00% 3 | 20.00% 2 | 50.00% 5 | 0.00% 0 | 10 | 4.20 |
| Responding to cold temperature injury | 9.09% 1 | 0.00% 0 | 36.36% 4 | 18.18% 2 | 36.36% 4 | 0.00% 0 | 11 | 3.73 |
| Canopy management | 0.00% 0 | 0.00% 0 | 30.00% 3 | 60.00% 6 | 10.00% 1 | 0.00% 0 | 10 | 3.80 |
| Other (please specify under comments) | 0.00% 0 | 0.00% 0 | 0.00% 0 | 0.00% 0 | 0.00% 0 | 100.00% 3 | 3 | 0.00 |

| # | Comments | Date |
|---|--|-------------------|
| 1 | The state viticulturist is extremely helpful and responsive. | 2/24/2016 9:08 AM |

2015 CO Wine Industry Research Survey

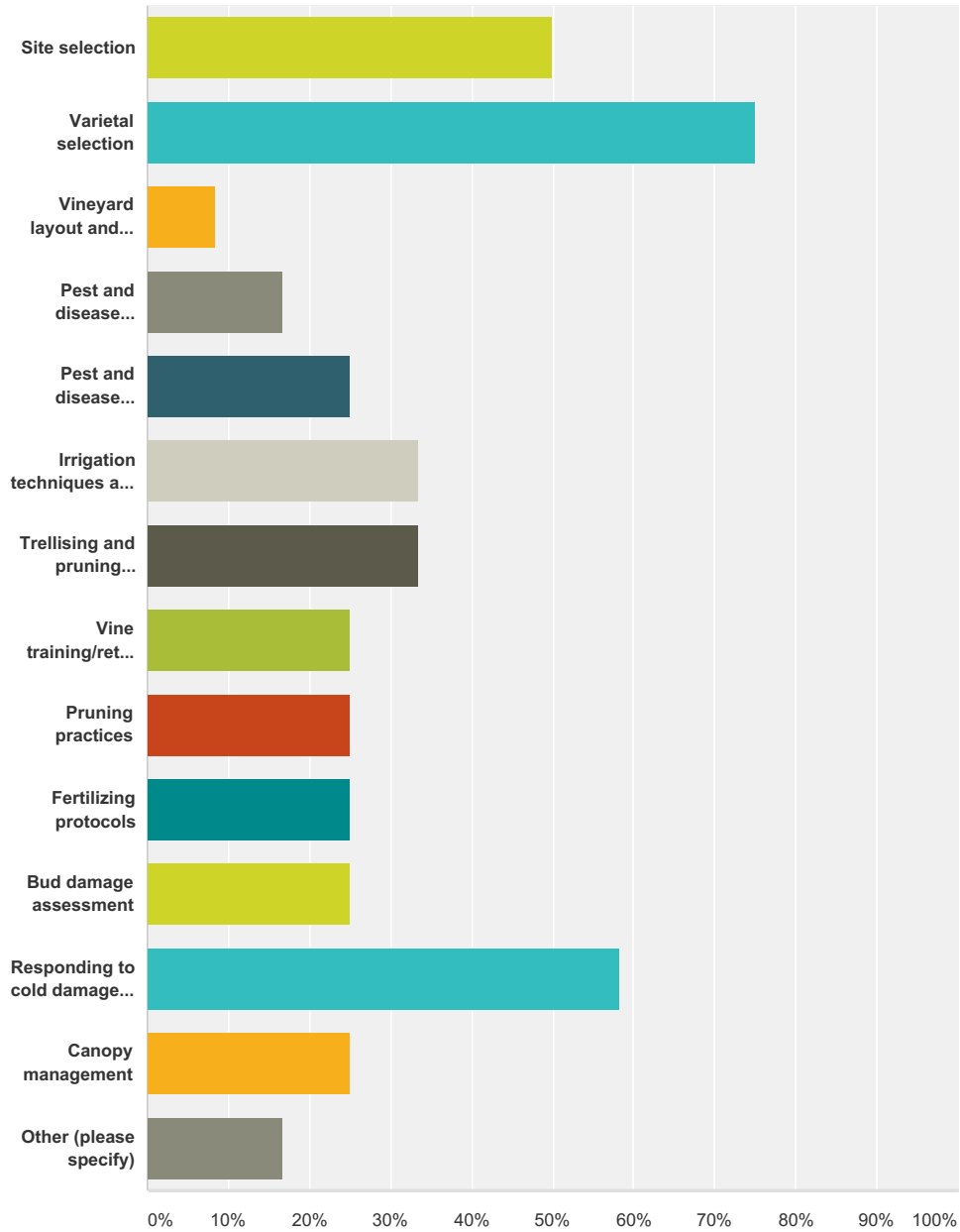
Q9 What is the biggest benefit your business has received from CSU's Viticultural Research? What could be improved about the viticulture research programs?

Answered: 9 Skipped: 14

| # | Responses | Date |
|---|---|-------------------|
| 1 | Cold hardy variety and rootstock testing in Colorado conditions, growers survey, quadrilateral training. | 2/24/2016 4:00 PM |
| 2 | The research on cold hardy cultivars, cold damage identification, irrigation practices, trellis techniques. Workshops covering these topics have been essential to our success. | 2/24/2016 9:12 AM |
| 3 | Biggest benefits are reporting of grape chemistry during harvest and having ongoing access to the research data. It would be nice to have 4 or so viticulture-oriented seminar-type events every year between Dec and July. These could cover a variety of topics (like all of those in the previous question); the important part is that they focus on growing in Colorado and/or colder regions/shorter seasons, and they consider at BOTH hybrid and Vitis vinifera cultivars. We are capable of growing both, and both are important to the long-term viability of the industry. Perhaps this would help to shift into a more productive and less pessimistic outlook on the challenges we face. | 2/22/2016 6:02 PM |
| 4 | have not received much practical information. I would like to see more pest and disease programs recommended dealing with organic and conventional farming practices. | 2/9/2016 3:19 PM |
| 5 | Increase in variety of grapes available | 2/7/2016 10:43 AM |
| 6 | -Cold hardiness research and cultivar trials are the best benefits -Improvement would be to have CSU supply salaries for researchers | 2/1/2016 12:29 PM |
| 7 | Training extra trunks to replace cold injured to maintain yield was key. More variety trials & crown gall research would be very helpful. Get on the Phyloxera infestation NOW! | 1/30/2016 2:58 PM |
| 8 | Benefits received from my commercial grape growing friends has been very poor at best, the the point of many of those growers feeling the North Fork Doesn't Matter. Second question answer, Improved Relevant Research..... | 1/29/2016 5:32 PM |
| 9 | The biggest benefit so far has been the move to multiple cane/cordon pruning to ensure and adequate number of buds. | 1/16/2016 2:43 PM |

Q10 From the same list as the question before last, please select 3-5 topics of the greatest interest and/or benefit to you and your business on which you would like to see more research done?

Answered: 12 Skipped: 11



| Answer Choices | Responses |
|----------------------------|-----------|
| Site selection | 50.00% 6 |
| Varietal selection | 75.00% 9 |
| Vineyard layout and design | 8.33% 1 |

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| | | |
|---|--------|---|
| Pest and disease identification | 16.67% | 2 |
| Pest and disease protection or mitigation | 25.00% | 3 |
| Irrigation techniques and issues | 33.33% | 4 |
| Trellising and pruning techniques | 33.33% | 4 |
| Vine training/retraining | 25.00% | 3 |
| Pruning practices | 25.00% | 3 |
| Fertilizing protocols | 25.00% | 3 |
| Bud damage assessment | 25.00% | 3 |
| Responding to cold damage injury | 58.33% | 7 |
| Canopy management | 25.00% | 3 |
| Other (please specify) | 16.67% | 2 |
| Total Respondents: 12 | | |

| # | Other (please specify) | Date |
|---|---|-------------------|
| 1 | cover crops | 1/30/2016 4:04 PM |
| 2 | There is a place for Vinifera in The North Fork and Research into those areas would be of significant value to the Colorado Wine Industry | 1/29/2016 5:32 PM |

Q11 What additional topics for research or education, not already mentioned in the previous questions, would you like to see pursued for the Colorado grape growing industry? These can be topics currently or formerly researched or new ideas altogether. Please list additional topics in order of your priority.

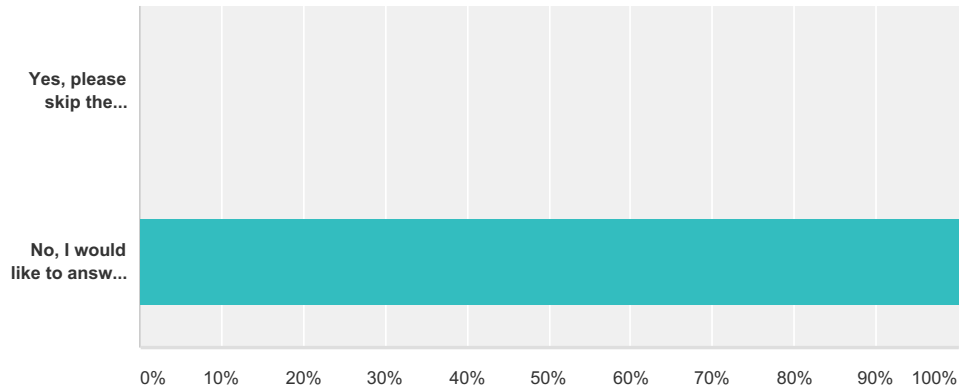
Answered: 3 Skipped: 20

| Answer Choices | Responses | |
|-------------------------|-----------|---|
| #1 Viticulture Priority | 100.00% | 3 |
| #2 Viticulture Priority | 66.67% | 2 |
| #3 Viticulture Priority | 33.33% | 1 |
| #4 Viticulture Priority | 33.33% | 1 |
| #5 Viticulture Priority | 33.33% | 1 |

| # | #1 Viticulture Priority | Date |
|---|--|-------------------|
| 1 | cover crop trials | 2/1/2016 12:29 PM |
| 2 | Stop Phyloxera! | 1/30/2016 2:58 PM |
| 3 | An assessment of bud break delaying spray applications | 1/16/2016 2:43 PM |
| # | #2 Viticulture Priority | Date |
| 1 | Stop crown gall | 1/30/2016 2:58 PM |
| 2 | An assessment of ground mounted vertical draft wind machines on frost protection | 1/16/2016 2:43 PM |
| # | #3 Viticulture Priority | Date |
| 1 | Variety trials | 1/30/2016 2:58 PM |
| # | #4 Viticulture Priority | Date |
| 1 | Cold damage mitigation | 1/30/2016 2:58 PM |
| # | #5 Viticulture Priority | Date |
| 1 | Trellising & pruning | 1/30/2016 2:58 PM |

Q12 Would you like to skip the section on enology research if it does not apply to you or your business.

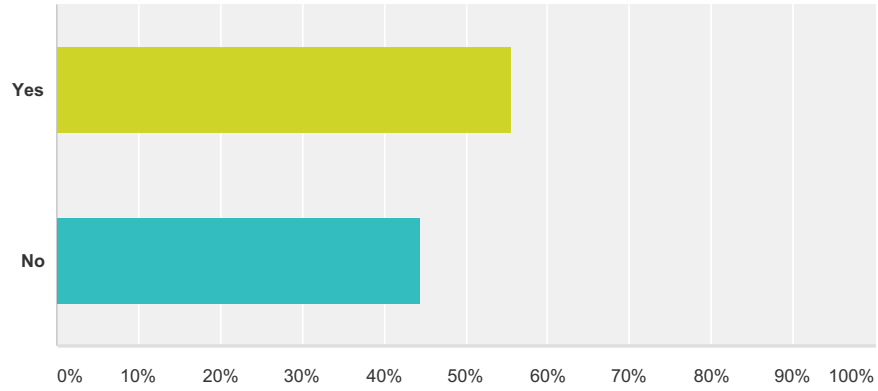
Answered: 12 Skipped: 11



| Answer Choices | Responses |
|--|------------|
| Yes, please skip the enology research questions. | 0.00% 0 |
| No, I would like to answer questions about enology research. | 100.00% 12 |
| Total | 12 |

Q13 Have you or someone else at your winery consulted the CSU State Enologist for information, advice or an on-site/winery set-up consultation?

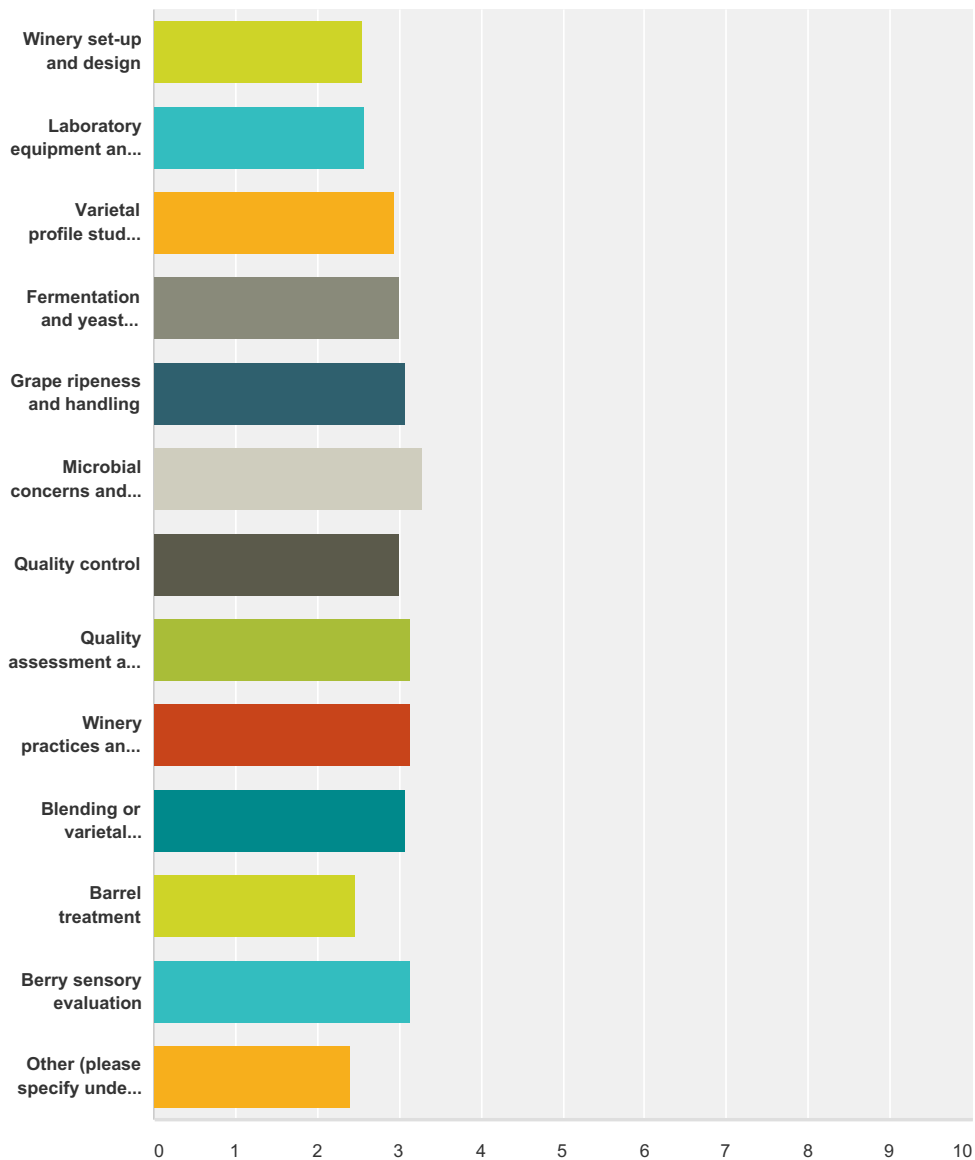
Answered: 18 Skipped: 5



| Answer Choices | Responses | |
|----------------|-----------|-----------|
| Yes | 55.56% | 10 |
| No | 44.44% | 8 |
| Total | | 18 |

Q14 How valuable--in terms of monetary savings, immediate returns or increased quality and efficiency--do you feel the information you have received from CSU's Enology Program has been to your operation for each of the following topics? The information may have come through personal consultation with the State Enologist, public seminars or from on-line/printed materials. If your business has no enological functions, skip this question. If the particular topic does not apply to you, please select "N/A."

Answered: 18 Skipped: 5



2015 CO Wine Industry Research Survey

| | Of no value whatsoever | Of little value | Somewhat valuable | Very valuable | Extremely valuable | N/A | Total | Weighted Average |
|---|------------------------|-----------------|-------------------|---------------|--------------------|-------------|-------|------------------|
| Winery set-up and design | 27.78% 5 | 5.56% 1 | 16.67% 3 | 16.67% 3 | 5.56% 1 | 27.78% 5 | 18 | 2.54 |
| Laboratory equipment and protocols | 23.53% 4 | 17.65% 3 | 23.53% 4 | 5.88% 1 | 11.76% 2 | 17.65% 3 | 17 | 2.57 |
| Varietal profile studies unique to Colorado | 22.22% 4 | 5.56% 1 | 33.33% 6 | 11.11% 2 | 16.67% 3 | 11.11% 2 | 18 | 2.94 |
| Fermentation and yeast nutrition issues | 22.22% 4 | 11.11% 2 | 11.11% 2 | 22.22% 4 | 16.67% 3 | 16.67% 3 | 18 | 3.00 |
| Grape ripeness and handling | 23.53% 4 | 5.88% 1 | 17.65% 3 | 23.53% 4 | 17.65% 3 | 11.76% 2 | 17 | 3.07 |
| Microbial concerns and spoilage prevention | 23.53% 4 | 5.88% 1 | 5.88% 1 | 29.41% 5 | 23.53% 4 | 11.76% 2 | 17 | 3.27 |
| Quality control | 22.22% 4 | 0.00% 0 | 27.78% 5 | 33.33% 6 | 5.56% 1 | 11.11% 2 | 18 | 3.00 |
| Quality assessment and evaluation | 22.22% 4 | 0.00% 0 | 27.78% 5 | 22.22% 4 | 16.67% 3 | 11.11% 2 | 18 | 3.13 |
| Winery practices and procedures | 16.67% 3 | 16.67% 3 | 16.67% 3 | 16.67% 3 | 22.22% 4 | 11.11% 2 | 18 | 3.13 |
| Blending or varietal characteristics | 22.22% 4 | 11.11% 2 | 11.11% 2 | 16.67% 3 | 22.22% 4 | 16.67% 3 | 18 | 3.07 |
| Barrel treatment | 22.22% 4 | 16.67% 3 | 27.78% 5 | 16.67% 3 | 0.00% 0 | 16.67% 3 | 18 | 2.47 |
| Berry sensory evaluation | 22.22% 4 | 11.11% 2 | 11.11% 2 | 11.11% 2 | 27.78% 5 | 16.67% 3 | 18 | 3.13 |
| Other (please specify under comments) | 33.33% 3 | 0.00% 0 | 0.00% 0 | 11.11% 1 | 11.11% 1 | 44.44% 4 | 9 | 2.40 |

| # | Comments | Date |
|---|--|--------------------|
| 1 | Everything regarding these topics has come from outside sources | 2/1/2016 11:22 AM |
| 2 | Did not know the State Enologist was available for consultation. | 1/31/2016 10:20 AM |
| 3 | More marketing help | 1/30/2016 3:04 PM |
| 4 | There is no serious outreach, only preconceived notions of an untested hybrid market, with marginal wine making results, using a strange blending protocol that continues to focus on the availability of vinifera grapes. | 1/29/2016 9:12 PM |

2015 CO Wine Industry Research Survey

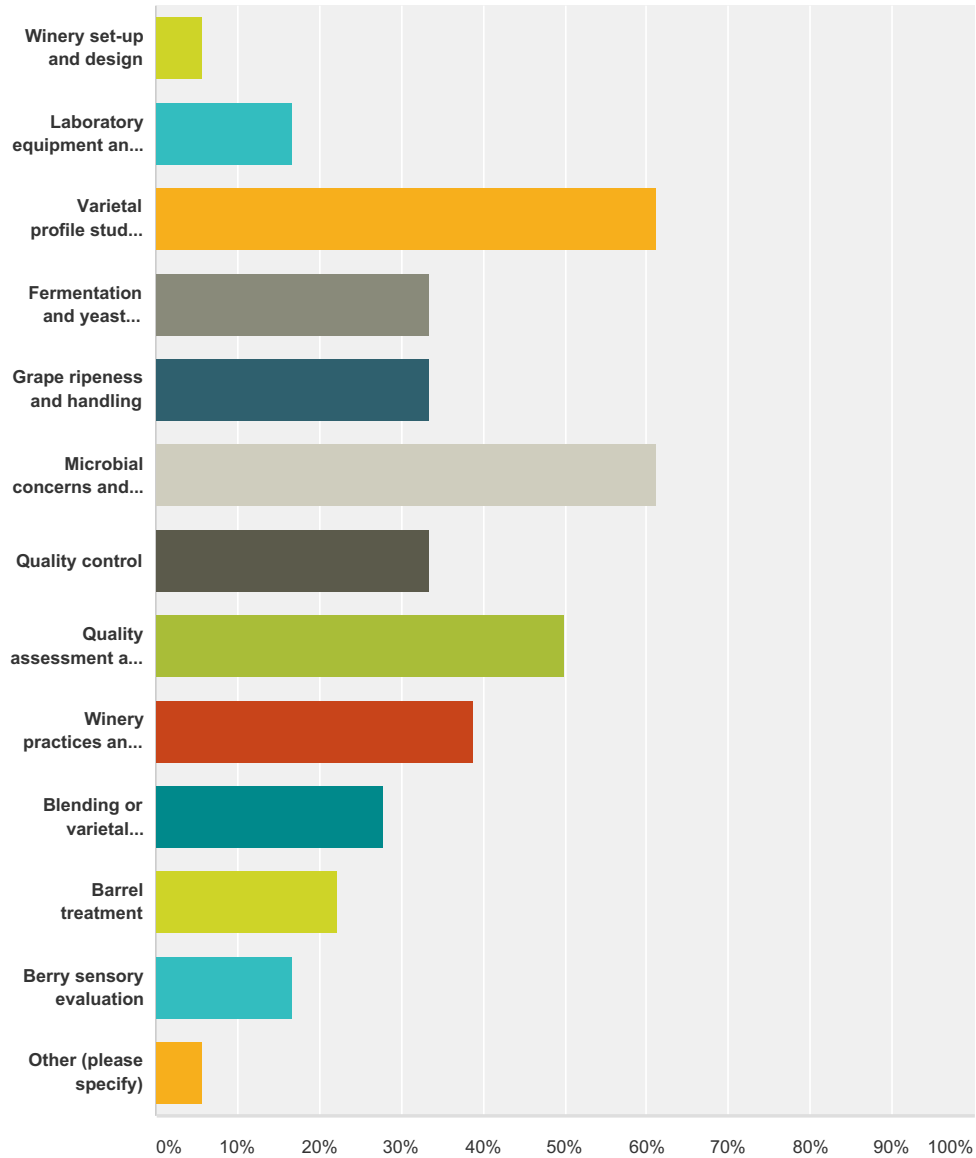
Q15 What is the biggest benefit your business has received from CSU's Enological Research?What could be improved about the enology research programs?

Answered: 9 Skipped: 14

| # | Responses | Date |
|---|---|--------------------|
| 1 | The workshops that the State Enologist presents are excellent. He has also tasted our wine and provided extremely helpful suggestions. | 2/24/2016 9:19 AM |
| 2 | NA | 2/24/2016 9:03 AM |
| 3 | The biggest benefit has been the ability to receive educated input from the State Enologist when issues arise. Similar to the viticulture side, I think that 4 or so seminars from the State Enologist between the months of Dec and July would be a way to productively work through various wine making activities (like those mentioned in the previous question). If this were to happen consistently, year over year, we would be able to expand our knowledge not only of wine making techniques and how they are unique to Colorado, but it would also give people a chance to become more familiar with and have more of a connection to the State Enologist. | 2/22/2016 6:11 PM |
| 4 | Additional information about use of cold hardy hybrid grapes | 2/7/2016 10:46 AM |
| 5 | Starting in 2015 we are able to get Yan and Nopa numbers from Horst. For the wineries that are interested, this is a big breakthrough. I just hope other wineries get on board. So many of the flawed wine is due to nutrition, or should I say lack of understanding of the yease nutritional needs. | 2/5/2016 2:23 PM |
| 6 | We make use of the CSU Research station periodically. It is incredibly convenient to have these resources just up the road from the winery. The seminars that CSU and the CWIDB have provided on cellar sanitation, lab procedures, and sensory training/quality assurance have been very valuable. | 2/2/2016 3:56 PM |
| 7 | -startup advice and cultivar wine evaluation and blending -CSU pay for enology research assistants/students | 2/1/2016 12:36 PM |
| 8 | None | 1/31/2016 10:25 AM |
| 9 | Benefit: microbial & spoilage info Need:more wine style info ie Vinho verde making? Saingnee' ? PetNat? Reverse osmosis? | 1/30/2016 3:18 PM |

Q16 From the same list as the question before last, please select 3-5 topics of the greatest interest and/or benefit to you and your business on which you would like to see more research done?

Answered: 18 Skipped: 5



| Answer Choices | Responses |
|---|-----------|
| Winery set-up and design | 5.56% 1 |
| Laboratory equipment and protocols | 16.67% 3 |
| Varietal profile studies unique to Colorado | 61.11% 11 |
| Fermentation and yeast nutrition issues | 33.33% 6 |
| Grape ripeness and handling | 33.33% 6 |

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| | | |
|--|--------|----|
| Microbial concerns and spoilage prevention | 61.11% | 11 |
| Quality control | 33.33% | 6 |
| Quality assessment and evaluation | 50.00% | 9 |
| Winery practices and procedures | 38.89% | 7 |
| Blending or varietal characteristics | 27.78% | 5 |
| Barrel treatment | 22.22% | 4 |
| Berry sensory evaluation | 16.67% | 3 |
| Other (please specify) | 5.56% | 1 |
| Total Respondents: 18 | | |

| # | Other (please specify) | Date |
|---|------------------------|-------------------|
| 1 | Wine style info | 1/30/2016 3:18 PM |

2015 CO Wine Industry Research Survey

Q17 What topics for research or education would you like to see pursued for the Colorado wine making industry? These can be topics currently or formerly researched or new ideas altogether. Please indicate the order of priority for your suggestions.

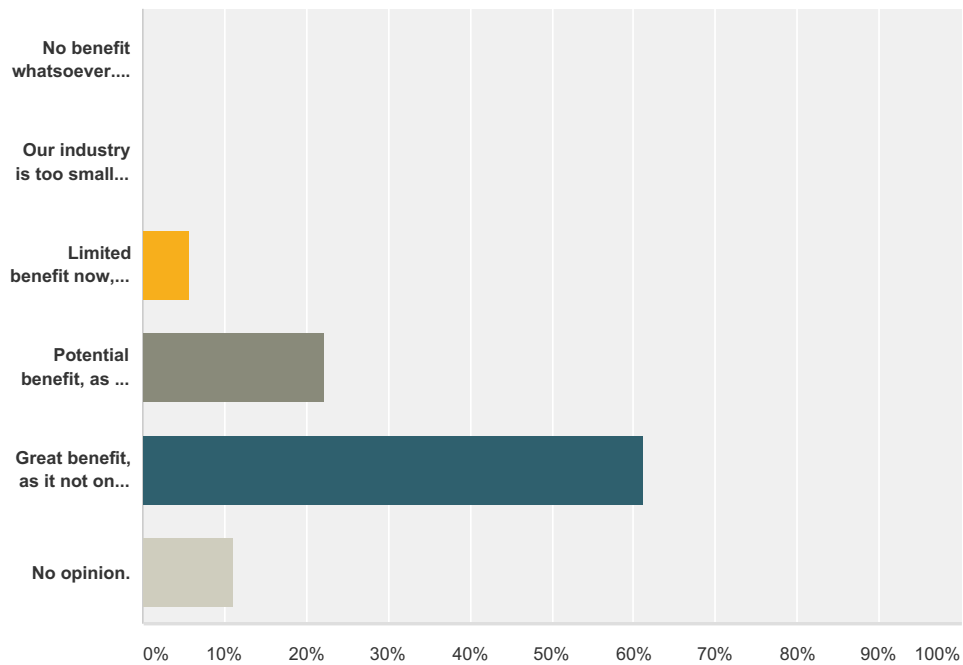
Answered: 5 Skipped: 18

| Answer Choices | Responses |
|---------------------|-----------|
| #1 Enology Priority | 100.00% 5 |
| #2 Enology Priority | 80.00% 4 |
| #3 Enology Priority | 60.00% 3 |
| #4 Enology Priority | 40.00% 2 |
| #5 Enology Priority | 0.00% 0 |

| # | #1 Enology Priority | Date |
|---|--|--------------------|
| 1 | Yan and Nopa | 2/5/2016 2:23 PM |
| 2 | sensory training | 2/2/2016 3:56 PM |
| 3 | enology quality assurance curriculum | 2/1/2016 12:36 PM |
| 4 | Varietal studies | 1/31/2016 10:25 AM |
| 5 | Research and/or advice on acidity levels vs wine style for Colorado grapes | 1/16/2016 2:48 PM |
| # | #2 Enology Priority | Date |
| 1 | Understanding Phenolics especially in Colorado | 2/5/2016 2:23 PM |
| 2 | quality | 2/2/2016 3:56 PM |
| 3 | Quality assessment and evaluation | 1/31/2016 10:25 AM |
| 4 | An understanding of the role of pH in flavor profile expression in Colorado grapes | 1/16/2016 2:48 PM |
| # | #3 Enology Priority | Date |
| 1 | better understanding of free and total SO2 especially day to day | 2/5/2016 2:23 PM |
| 2 | consistency | 2/2/2016 3:56 PM |
| 3 | Grape ripeness and handling | 1/31/2016 10:25 AM |
| # | #4 Enology Priority | Date |
| 1 | White Wines - understanding the effects of O2 during crush and all aspects of fermentation | 2/5/2016 2:23 PM |
| 2 | Microbial and spoilage concerns | 1/31/2016 10:25 AM |
| # | #5 Enology Priority | Date |
| | There are no responses. | |

Q18 Which of the following statements best describes how much benefit you see to in-state educational training programs in Viticulture and Enology to the future of Colorado's wine and grape industry in terms of turning out future winemakers, vineyard managers, technicians and qualified staff or improving quality? This applies to CSU's Viticulture and Enology emphasis within the Dept. of Horticulture and Landscape Architecture, Colorado Mesa University's impending two-year program, VESTA or any other similar educational program.

Answered: 18 Skipped: 5



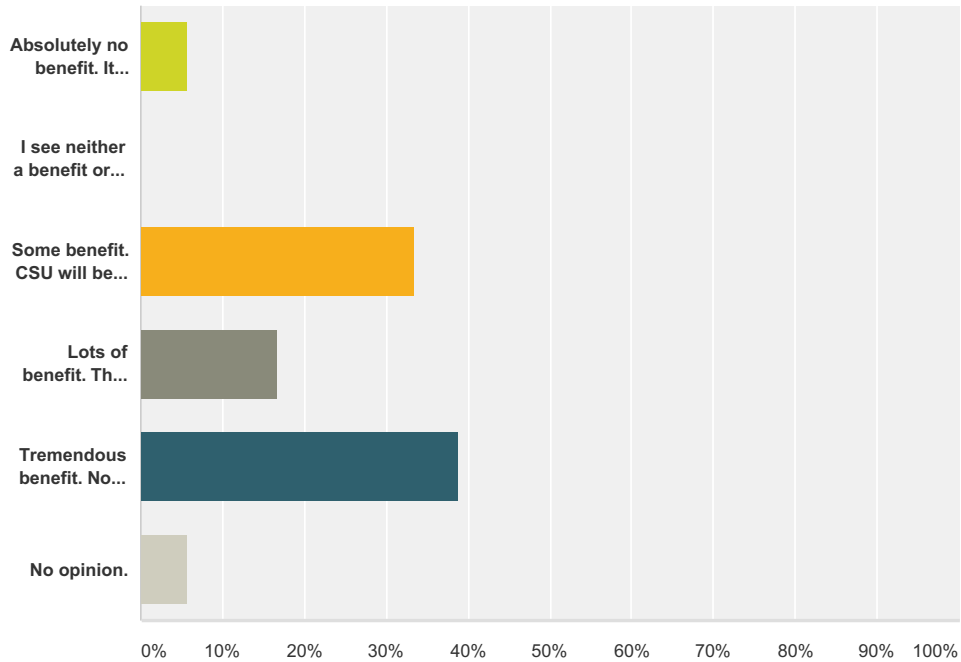
| Answer Choices | Responses |
|--|-----------|
| No benefit whatsoever. This is a waste of time and resources. | 0.00% 0 |
| Our industry is too small to need a training program for new staff. But we may grow into a need in the future. | 0.00% 0 |
| Limited benefit now, as only a few of the largest wineries and vineyards can employ staff. | 5.56% 1 |
| Potential benefit, as it will help keep talented winemakers and grape-growers in Colorado. | 22.22% 4 |
| Great benefit, as it not only keeps talented people in Colorado, but also elevates the quality, the image and credibility of the Colorado wine industry. | 61.11% 11 |
| No opinion. | 11.11% 2 |
| Total | 18 |

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| # | Comments. | Date |
|---|---|--------------------|
| 1 | The students must have hands on experience making wine. Not just viticulture. | 1/31/2016 10:36 AM |
| 2 | The question was loaded for this response.... | 1/29/2016 9:15 PM |
| 3 | <p>The majority of Colorado wineries are not in a position to hire staff no mater how well trained they might be. What is required is additional training for those of us that are quite likely responsible for making decisions and taking action on grape growing, winemaking, quality control, bottling, microbiology, etc., often all in the same day. We are not able to run a vineyard/winery and take the time to attend classes at CSU/CMU or anywhere else. The most useful educational opportunity I received since the discontinuation of the Wine Tech series of events a decade or so ago, has been the CAVE-sponsored seminar by Clark Smith this past year. I believe that fastest way to improve Colorado wine quality is to bring what is already known about enology to those in the industry who need and want it most but cannot afford the time to attain yet another degree or travel to CA to attend classwork at Davis. Bringing the instructors here to Colorado for short, intense sessions on specific topics is an ideal way to accomplish that. Once we have Colorado grapes to work with, there is very little need for primary research into the unique enological challenges associated with those grapes. What is needed is application of what is already known about enology to the creation of wine from those Colorado grapes. Any perceived issue with Colorado wine quality, consistency, style, etc. is more likely to be addressed by the application of known principles rather than by the discovery of new enological knowledge. This suggests a program that is more akin to a state wide enological consultant or to the UDSA's county agent outreach program, than to the traditional University-led research program.</p> | 1/16/2016 3:13 PM |

Q19 Which statement best describes your feelings about any benefits to Colorado's wine and grape industry from CSU having a teaching and research winery at Orchard Mesa?

Answered: 18 Skipped: 5



| Answer Choices | Responses |
|--|-----------|
| Absolutely no benefit. It is pointless competition for the other wineries and potentially makes grapes harder to buy. | 5.56% 1 |
| I see neither a benefit or a drawback to CSU's winery. | 0.00% 0 |
| Some benefit. CSU will be making wine out of their experimental cultivars anyway, and should put that wine and that energy to use for educational purposes. | 33.33% 6 |
| Lots of benefit. This is a good hands on training ground for enology students, since most Colorado wineries are too small to hire interns for that purpose. | 16.67% 3 |
| Tremendous benefit. Not only does the winery elevate the image and the credibility of the Colorado wine industry, but it also provides a necessary training facility for the next generation of winemakers and wine sales support other research projects and endeavors. | 38.89% 7 |
| No opinion. | 5.56% 1 |
| Total | 18 |

| # | Comments. | Date |
|---|--|--------------------|
| 1 | I disagree that most Colorado wineries are too small to hire interns. I have a very small winery and have hired an intern from the Fermentation Science program at CSU for the semester. The viticulture/enology students at CSU are desperate for hands on wine making experience (hearing that from the program's students). That said, it is not required by their program to get an internship, as it is in Fermentation Science. Also, if the V/E program at CSU starts to require an internship (90 hours), it will be important not to be too restrictive in its requirements. They should be able to work in a winery, cidery, meadery. ANY hands on experience would be beneficial. The Fermentation Science students can get an internship in any business that has fermenting products: beer,wine, cheese, kombucha, etc. | 1/31/2016 10:36 AM |
| 2 | The question was loaded for this response.... | 1/29/2016 9:15 PM |

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| | | |
|---|--|-------------------|
| 3 | <p>Lack of enological research is not the limiting factor with respect to the growth of the Colorado wine industry. We are limited by three things (in no particular order): 1. Lack of consistent size and quality of grape crop, 2. Lack of enological expertise in the hands of those currently making wine, and 3. Lack of access to markets at the price necessary to support viable business models. While, training winemakers at a CSU winery might, for those with an entrepreneurial bent, foster the creation of additional wineries in the state, those who might make wine in such a facility will find less than 5 possible existing openings for their skills in any given year. We would be training people who, unless they begin their own wineries, will have to find work outside of Colorado to make use of those skills.</p> | 1/16/2016 3:13 PM |
|---|--|-------------------|

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Q20 Are there other topics for research or education, outside enology and viticulture, that you would like to see pursued for the Colorado wine making industry? These can be topics currently or formerly researched or new ideas altogether, such as consumer behavior, economic impact, market trends, etc. Please list the items in the order of your priority.

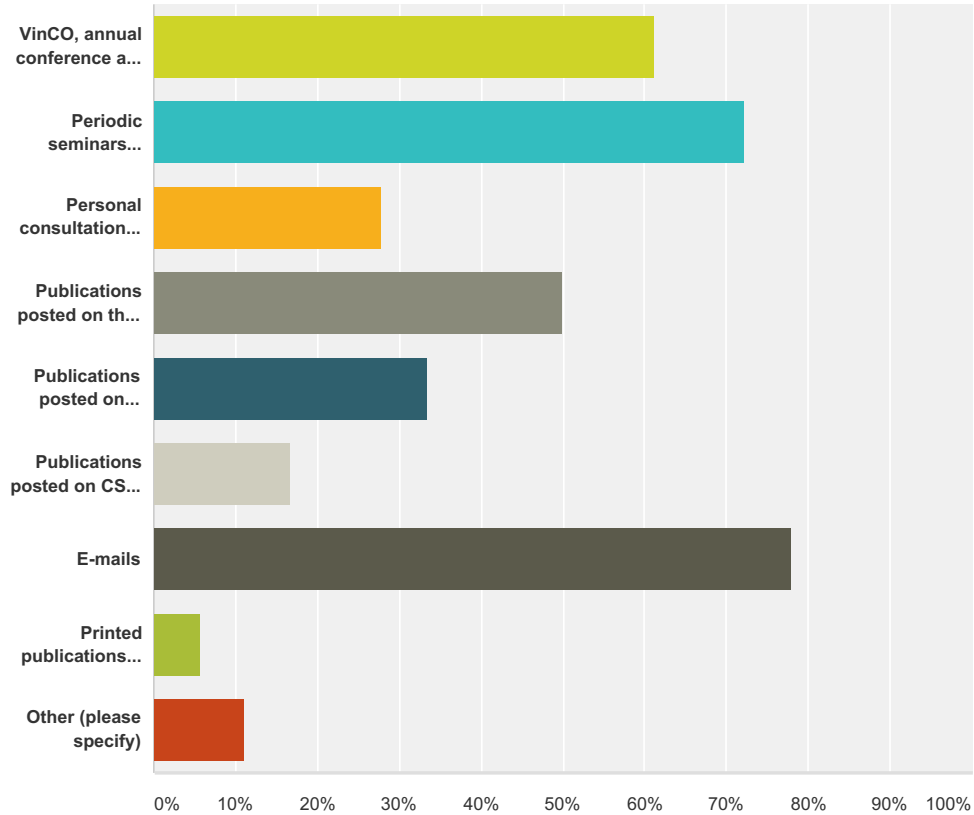
Answered: 6 Skipped: 17

| Answer Choices | Responses |
|-------------------|-----------|
| #1 Other research | 100.00% 6 |
| #2 Other research | 33.33% 2 |
| #3 Other research | 16.67% 1 |

| # | #1 Other research | Date |
|---|---|-------------------|
| 1 | marketing of colorado grapes, particularly out-of-state | 2/24/2016 4:08 PM |
| 2 | Business education,including info on current liquor laws, tax laws | 2/7/2016 10:48 AM |
| 3 | business skills and quality management systems | 2/1/2016 12:39 PM |
| 4 | Marketing CO wine. Why make it if you can't sell it. Every tourist should take home Co wine along with their t-shirt. | 1/30/2016 3:26 PM |
| 5 | How to use social/electronic media effectively | 1/16/2016 3:16 PM |
| 6 | ok | 1/15/2016 4:36 PM |
| # | #2 Other research | Date |
| 1 | identify new markets for colorado wineries, e.g.where could Colorado Riesling be marketed out-of-state? | 2/24/2016 4:08 PM |
| 2 | How to effectively foster and manage the growth of a winery | 1/16/2016 3:16 PM |
| # | #3 Other research | Date |
| 1 | Sustainable, non-petroleum based viticulture | 1/16/2016 3:16 PM |

Q21 How would you prefer to receive information from the research done in the Colorado wine and grape industry? Please check all that apply.

Answered: 18 Skipped: 5



| Answer Choices | Responses |
|--|-----------|
| VinCO, annual conference and industry trade show | 61.11% 11 |
| Periodic seminars outside VinCO, held on both sides of the Divide | 72.22% 13 |
| Personal consultations, for which I would be willing to pay a modest fee for individual training | 27.78% 5 |
| Publications posted on the CO Wine Board's web site, coloradowine.com | 50.00% 9 |
| Publications posted on CAVE's web site, winecolorado.org | 33.33% 6 |
| Publications posted on CSU's Western Colorado Research Center's web site, aes-wrcr.agsci.colostate.edu | 16.67% 3 |
| E-mails | 77.78% 14 |
| Printed publications mailed to me | 5.56% 1 |
| Other (please specify) | 11.11% 2 |
| Total Respondents: 18 | |

| # | Other (please specify) | Date |
|---|--|-------------------|
| 1 | Digging information out of CSU's website is cumbersome and frequently of little value. | 1/29/2016 9:17 PM |
| 2 | ok | 1/15/2016 4:36 PM |

Q22 What other comments and suggestions would you like to share about research and outreach within the Colorado wine and grape industry?

Answered: 5 Skipped: 18

| # | Responses | Date |
|---|--|-------------------|
| 1 | We are new to grape growing and wine making, and without the help of CSU viticulture and enology research and education programs, we would be lost. Keep up the good work. | 2/24/2016 9:24 AM |
| 2 | I continue to marvel at the well made wines in Colorado. | 2/5/2016 2:26 PM |
| 3 | -complete long-range planning study by CWIDB | 2/1/2016 12:39 PM |
| 4 | more seminars out side of vinco which I will gladly pay entrance fees | 2/1/2016 11:27 AM |
| 5 | OK | 1/15/2016 4:36 PM |