



2019

Colorado Wine Industry Development Board
Colorado Wine Tracking Study
Final Report ~ July 1, 2019

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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 each spring, since 2014.
- This tracking study includes a respondent quota for age breaks and consumption, based on how users naturally fell in previous years of research. Quotas keep the sample consistent from year to year for an "apples to apples" comparison of data over time.

Research Objectives:

- Compare 2019 vs. 2018 vs. 2017 awareness, usage and attitudes toward Colorado wines among monthly wine drinkers in Colorado.
- Compare a sub-group of Denver Metro wine drinkers.
- Continue to track and compare more frequent - weekly+ wine drinkers
- Add in any custom questions to address strategic planning for upcoming year (e.g. wine segments of users in 2018 and 2019).

RESPONDENTS

Respondents

- N= 505; mix males, females
- Ages 21-70
- Colorado residents
- Past month wine consumption
- Sub cells and quotas set (based on previous tests) for:
 - Weekly+ wine drinkers
 - Denver Metro wine drinkers
 - Colo wine consumers
 - Hard cider drinkers

Methodology:

- Online quantitative test using the same respondent panel over time.
- Quotas were set for gender, age, weekly+ wine drinkers, Denver metro wine drinkers and wine consumption frequency, based on previous tracking studies, so that data are comparable over time. Consumption frequency quotas:

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%

EXECUTIVE SUMMARY

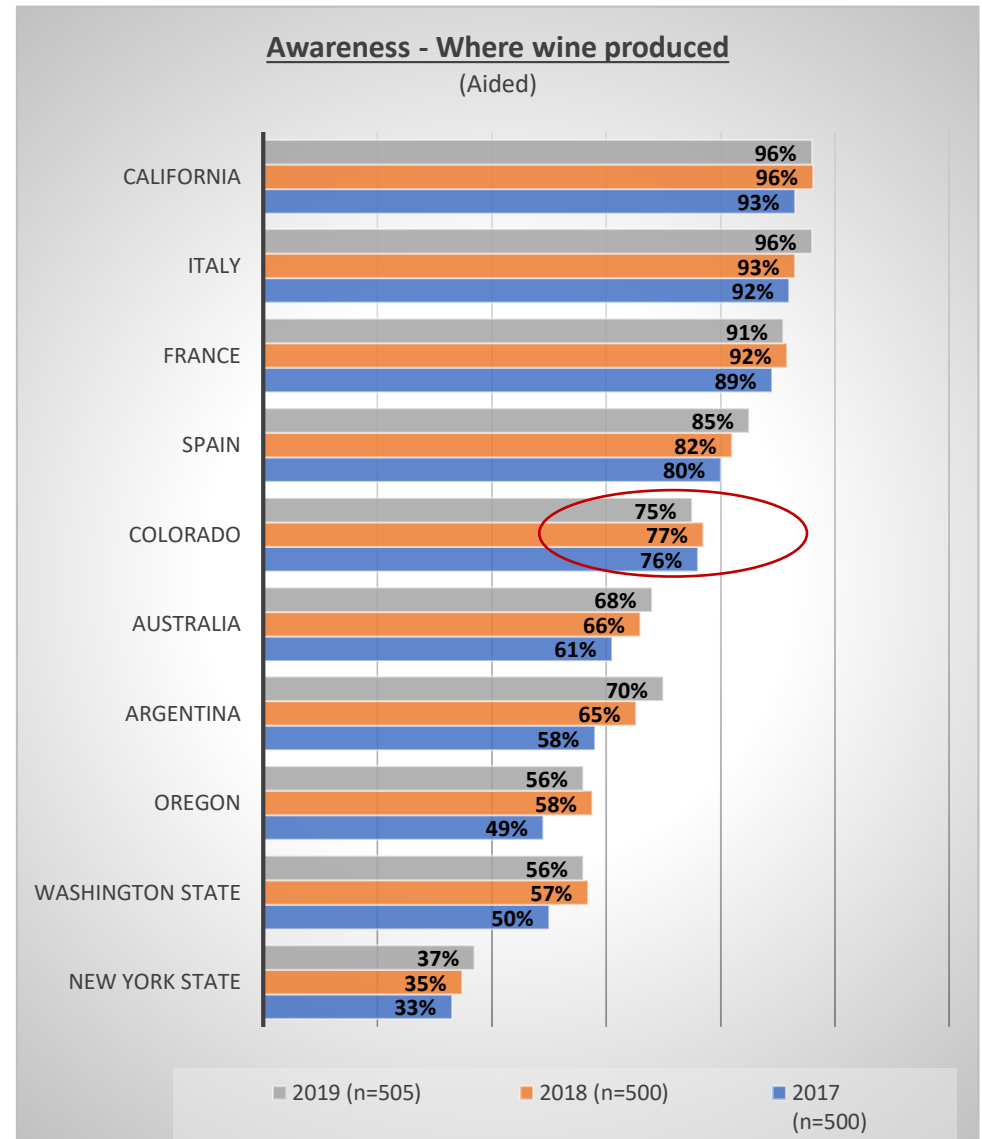
COLO WINE AWARENESS IS STEADY:

The percent of people aware of Colorado wines is the same over time - 75% in 2019 vs. 77% in 2018; statistically at parity.

- California wine awareness is on par with Italy (96%) and both are significantly higher vs. Colorado wine awareness.
- Notably, 25% of wine drinkers in Colorado are not aware of Colorado wines.

Insights:

- Colorado wines continue to have good awareness among Colorado residents - 75% among the total sample.
- However, there's room to grow - 25% are un-aware of Colo wines and there continues to be a large gap vs. California wine awareness.



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

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

OLDER MALES HIGHER IN COLO WINE AWARENESS:

In Metro Denver – where ad \$'s are spent:

- 2019 Colo wine awareness is on par to 2018, 76% index at 101 vs. the total sample.

Sub groups:

- 87% of 51-70 aged wine drinkers are aware of Colo wines – the highest among sub groups; indexing at 116 vs. the total.
- Males (81%) also index higher vs. total – 108.
- Awareness of Colo wines continues to be lowest among 21-35 (61%); indexing at 81 vs. total.
- Significantly fewer 36-50 are aware of Colo wines in 2019 (71%) vs. 2018 (81%).
- Experimenters are a new data cut in 2019 among those indicating Top 2 Box (T2 Box) on “*I like to experiment and taste different styles of wine and wines from different regions*” (q 21) and 76% are aware.

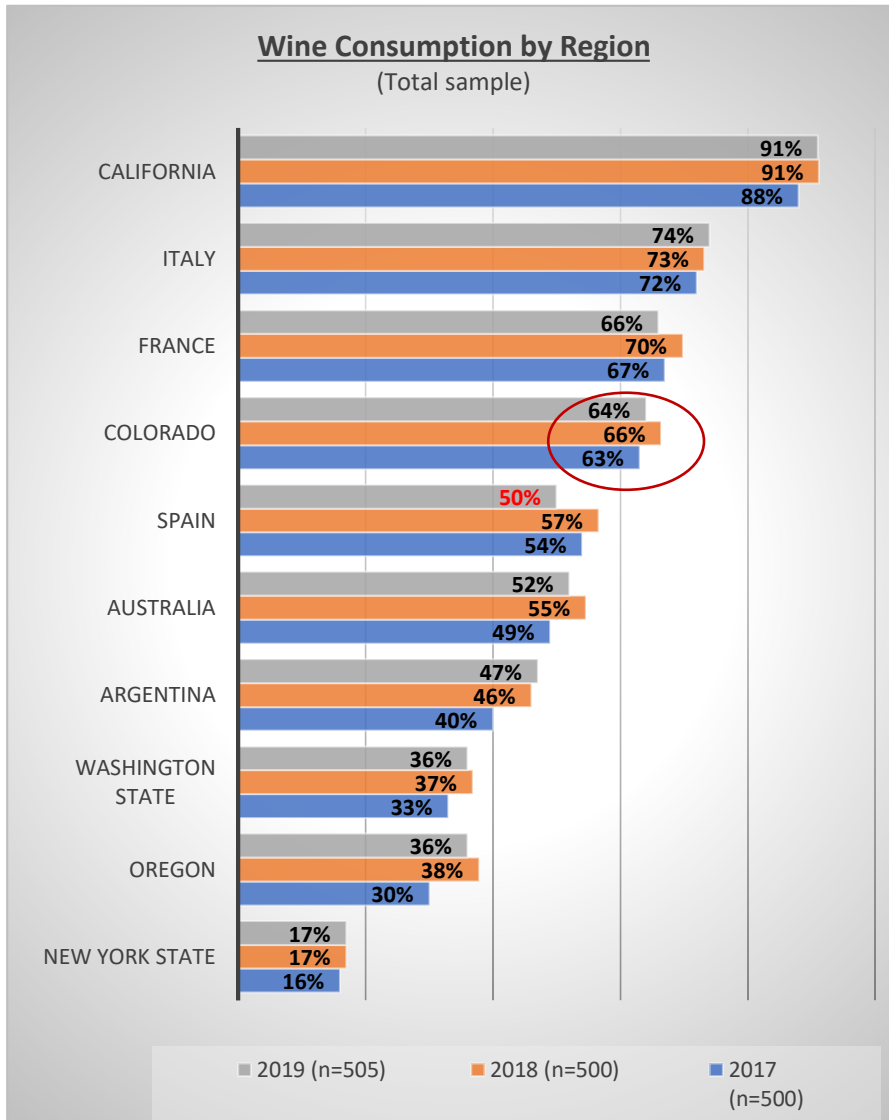
Insight:

Most subgroups of wine drinkers in Colorado are aware of Colorado wines, though there is room for improvement.

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.

Sub Group awareness of Colo wines	2019	2018	2017	Index to total 2019
Metro Denver	76%	77%	78%	101
Weekly + (frequent wine drinkers)	76%	80%	78%	101
Age 21 - 35	61%	66%	65%	81
Age 36-50	71%	81%	72%	95
Age 51-70	87%	84%	88%	116
Male	81%	78%	78%	108
Female	70%	76%	74%	93
Hard Cider Drinkers	69%	78%	81%	91
Experimenters	76%	na	na	101

WINE CONSUMPTION STEADY OVER TIME:



Colo wine consumption is 64% in 2019, statistically the same as 2018 (66%).

- Wine consumption is flat in most geographies, with no statistical difference vs. previous years.
- The exception is Spain –50% consumption penetration; down significantly from 57% in 2018.
- Most geographies are still lagging California wines in consumption (91%).

Among those aware of Colorado wine, 86% have consumed it; this is on par with 2018 (86%).

- Colorado wine conversion from awareness to trial / consumption is 2nd to only California wines (95% of those aware of Cali wine have consumed it).

Insight: Once aware, drinkers try Colorado wine.

2019- Conversion to consumption of Colo wine Among those aware – Total sample

California	95%
Colorado	86%
Italy	78%
Australia	77%
France	73%
Argentina	67%
Oregon	64%
Washington State	65%
Spain	59%
New York State	46%

COLO WINE CONSUMPTION AMONG SUBGROUPS:

More Older Males have consumed Colo wine:

- 70% of males and 73% of 51-70 have consumed Colo wines.

Sub groups:

- Consumption, like awareness, of Colo wines continues to be lowest among 21-35 (51%); indexing at 80 vs. total.
- 65% of Metro Denver wine drinkers have consumed Colo wines, slightly up in 2019, but not significantly so.

Conversion to consumption of Colo wine among those aware:

- 94% of 21-34 year olds that are aware of Colo wines have consumed it.

Sub Group Consumption of Colo. wines	2019	2018	2017	Index to total 2019
Metro Denver	65%	64%	62%	102
Weekly + (frequent wine drinkers)	66%	72%	66%	103
Age 21 - 35	51%	56%	57%	80
Age 36-50	65%	70%	58%	102
Age 51-70	73%	72%	71%	114
Male	70%	69%	67%	109
Female	60%	64%	60%	94
Hard Cider Drinkers	61%	69%	71%	95
Experimenters	67%	na	na	na

Insight: Once aware, conversion to consumption for Colo wines is very high among younger drinkers.

2019- Conversion to consumption of Colo wine Among those aware – By subgroup sample

Metro Denver	85%
Weekly + (frequent wine drinkers)	87%
Age 21 - 35	94%
Age 36-50	92%
Age 51-70	83%
Male	86%
Female	86%
Hard Cider Drinkers	89%
Experimenters	89%

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.

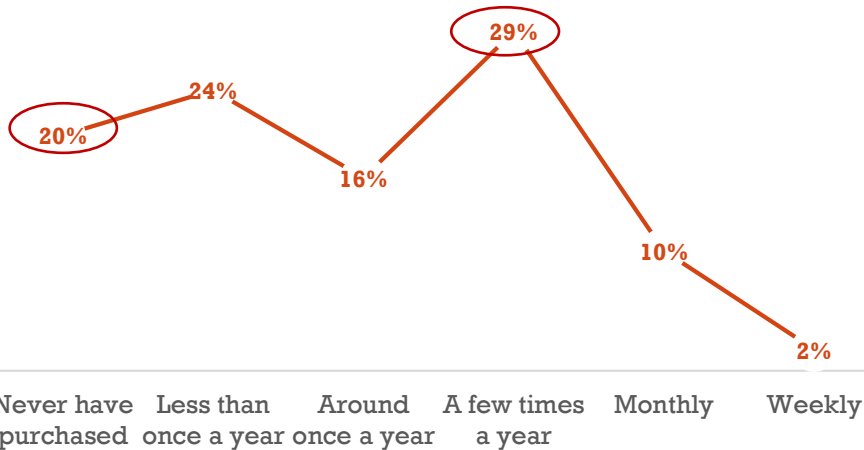
Q. 3 From which of the following geographic areas have you consumed wine? Check all that apply.

WINE PURCHASE FREQUENCY:

- Most (29%) purchase Colo wines a few times a year.
- 20% have never purchased Colo wine.
- Among frequent buyers (purchasing wine weekly and monthly) 12% purchase Colo wine on a weekly, monthly basis – down from 2018. *(Statistical variance at the 90% confidence level)*. These buyers tend to purchase European and California wines more regularly.

FREQUENCY PURCHASING COLO WINE

(2019 -AMONG TOTAL SAMPLE)



	Buy wine weekly, monthly		
	2019	2018	2017
European wine (e.g. France, Italy, Germany, etc.)	25%	21%	21%
California wine	40%	40%	41%
Colorado wine	12%	16%	20%
Washington and Oregon wine	8%	11%	13%
Wine from US States other than CA, OR, WA and CO	13%	9%	13%
Australia or New Zealand wine	11%	13%	17%
South American wine (e.g. Argentina, Chile, etc.)	11%	14%	16%

Insight: Awareness is relatively strong for Colo. wines and among those aware, 86% have consumed Colo. Wines. However, conversion to regular purchase of Colo. wines is very low – only 12% (monthly, weekly).

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.

BARRIERS TO COLO WINE PURCHASES:

Lack of familiarity with Colo wines is a barrier to purchase:

- Over time, non-purchasers of Colo wine remains statistically at parity, though slightly less in 2019 (20%) vs. 21% in 2018 and 23% in 2017.
- Top reasons stated in open ends, for not consuming or purchasing more Colo wine are a lack of familiarity, preference for other wines, price and availability.

	Have never purchased Wine from...		
	2019	2018	2017
European wine (e.g. France, Italy, Germany, etc.)	8%	9%	11%
California wine	4%	2%	4%
Colorado wine	20%	21%	23%
Washington and Oregon wine	28%	29%	32%
Wine from US States other than CA, OR, WA and CO	17%	27%	25%
Australia and New Zealand wine	24%	22%	25%
South American wine (e.g. Argentina, Chile, etc.)	22%	23%	30%

Why don't you consume or purchase more Colorado wines?	
Open-end – 2019 (n=490)	%
Not familiar with it/Never heard of it	20%
Prefer/Satisfied with other wines/wines from other region	16%
Sounds / expensive	16%
Prefer to try different varieties/wines from different locations in US	10%
Not available/Don't see it on the market	10%

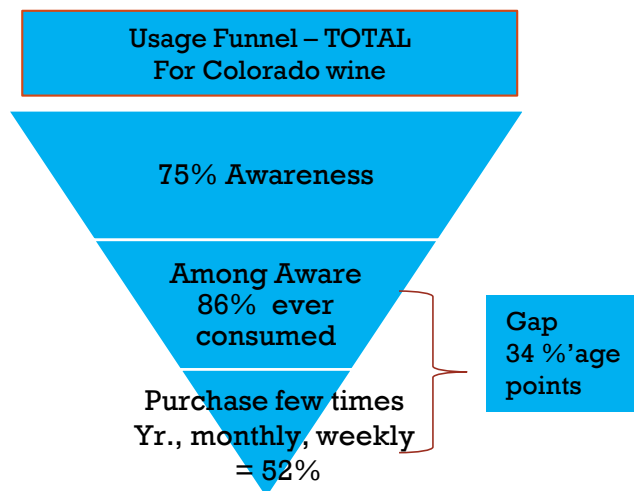
Q. 9 How often do you typically purchase wine from each of the following geographic areas? (check one timeframe that describes you best)

Q 19. Why don't you consume or purchase more Colorado wine? (open end – mandatory)

USAGE FUNNEL – COLO WINE:

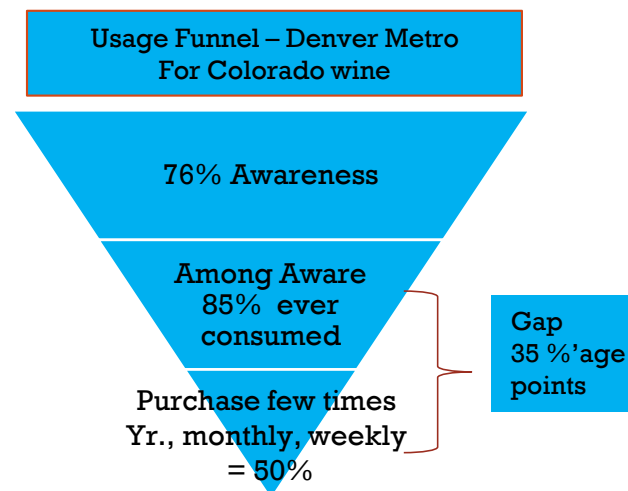
Among the total sample, Awareness and Trial of Colo Wines have good penetration but low purchase frequency.

- Among the total sample, 75% have heard of Colo wines. And of those aware of Colorado wines, 86% have tried Colo wines.
- However, only 52% purchase Colo wines on a regular basis (weekly, monthly and a few times a year). Gap =34 percentage points.



Similarly, in Denver, where ad money is spent, there is a large gap among those who regularly purchase Colo wine.

- In Metro Denver, 76% have heard of Colo wines. And of those aware of Colorado wines, 85% have tried Colo wines.
- However, only 50% purchase Colo wines on a regular basis (weekly, monthly and a few times a year). This is a gap of 35 percentage points.



Insights:

- Once aware of Colo Wine, consumers try it. However, conversion to regular purchase of Colo wine does not happen for most.
- Trial and repeat tactics at retail might help increase regular purchase of Colo wines.

FUTURE PURCHASE INTEREST FLAT:

Positive Future Purchase Interest (PI) for Colorado wine is statistically at parity with 2018:

- 63% indicate Top 2 Box Purchase Interest (definitely & probably will buy) in future; statistically at parity to 2018 (64%).
- So. American wine future purchase interest is statistically down in 2019 (57% T2 Box) vs. 2018 (63% T2 box).
- California wine purchase interest remains highest 86% T2 Box PI.

% Top 2 box purchase intent (5 pt. scale)	2019	2018	2017
California wine	86%	86%	86%
European wine	78%	76%	78%
Colorado wine	63%	64%	68%
Australia or New Zealand	61%	63%	65%
So. American wine	57%	63%	60%
Washington or Oregon wine	57%	58%	54%
Wine from US states other than CA, OR, WA and CO	50%	46%	48%

NOTE: significant differences vs. previous year - noted in red font at the 90% confidence level.

2019 Future Purchase Interest by Geography

(Total Sample n=505)

53% say they will definitely purchase Cali wine:

- Colorado wine purchase interest is 27% top box – definitely interested.
- 25% indicate they may or may not purchase Colo wine;
- Rejection / bottom box scores are low for all geographies.

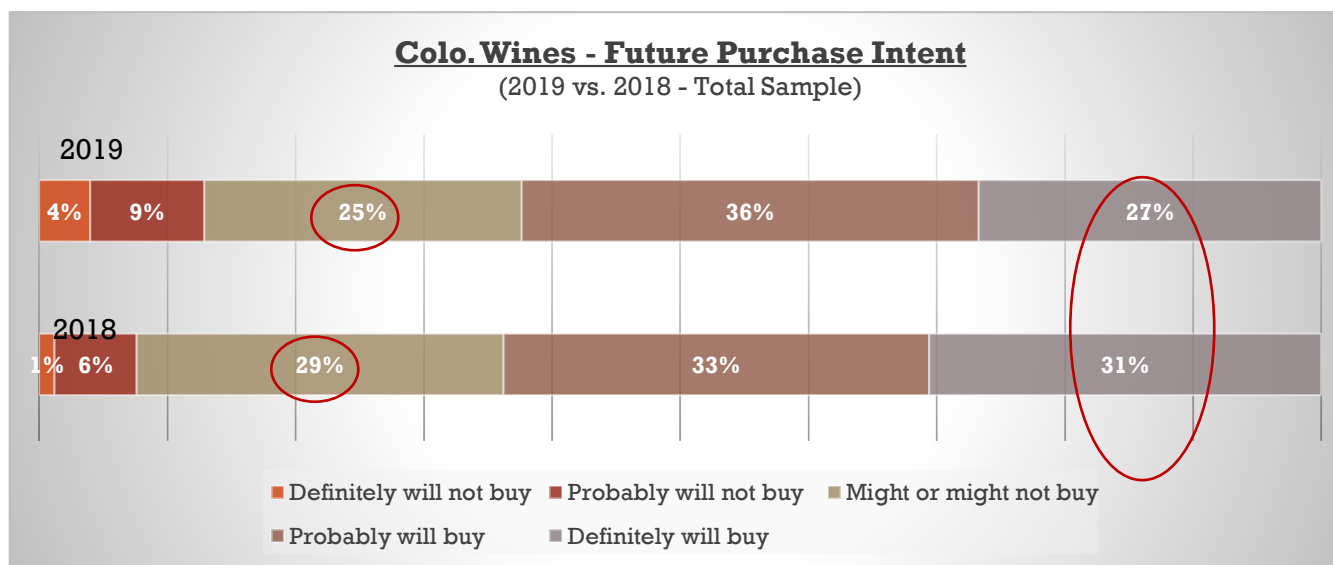


■ Definitely will not buy
 ■ Probably will not buy
 ■ Might or might not buy
 ■ Probably will buy
 ■ Definitely will buy

COLO. WINE PURCHASE INTEREST - FEWER FENCE SITTERS:

Comparing purchase interest for Colorado wines vs. last year, we see 25% state they may or may not purchase Colo wines; improved from 29% in 2018.

- Recall, 25% are not aware of Colo wines (slide 6) and likely make up a large number of the “may or may not purchase” fence sitters.
- Definitely will purchase – dropped to 27% from 31% in 2018 and Probably will purchase improved to 36% in 2019; up from 33% in 2018. These shifts are not statistically different.



Insight: Converting the “fence sitters” who may or may not buy Colo wines may be solved by generating awareness among the 25% who are un-aware of Colo wines.

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

Q.10 In the future, how interested are you in purchasing wine from each of the following geographic areas? (check one) 5 point scale.

FUTURE PURCHASE INTEREST STRONGER FOR COLO WINES AMONG YOUNGER DRINKERS:

Younger wine drinkers state stronger PI for Colo wines:

- Younger 21-35 wine drinkers state stronger Future PI (76%) for Colorado wines, indexing higher (121) vs. total.
- Among those who have consumed Colorado wines, their interest in repeat purchase is 68% T2 Box PI in 2019.
- Notably, 51-70 year-olds continue to be the lowest in terms of overall PI for Colo wines (52%); indexing 83 vs. total.

Sub Group PI of Colo. Wines (T2 Box %)	2019	2018	2017	Index to total 2019 (63%)
Metro Denver – Future PI- Colo wines	62%	62%	65%	98
Weekly + Future PI - Colo wines	61%	65%	69%	97
Colo. Wine drinkers – ever consumed (q3)	68%	71%	77%	108
Age 21 - 35	76%	72%	73%	121
Age 36-50	66%	61%	76%	105
Age 51-70	52%	59%	57%	83
Male	61%	62%	67%	97
Female	64%	66%	68%	102
Hard Cider Drinkers	67%	76%	77%	106
Experimenters	67%	na	na	na

Insights:

- Recall, awareness of Colo Wines is lowest among 21-35, 61%.
- And, purchase interest is highest among this younger sub-group (76% T2 Box).
- Increasing awareness among this younger demo, would yield trial, based on their interest in purchasing Colo Wines in the future.
- 51-70 drinkers are not as interested in purchasing Colo Wines.

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

COLO WINE SHARE OF PURCHASES:

More are allocating 20% or greater share to Colorado wines in 2019.

- In 2019, 34% of Colorado wine purchasers indicate they allocate 20% + of their wine purchases to Colorado-produced wines. This is up slightly vs. 2018 (30%), though not significantly so.
- However, 49% allocate less than 9% to Colo wines of all their wine purchases – a very small share.

Percent of Colo Wine purchases – among CO. wine drinkers	2019 (n=323)	2018 (n=332)	2017 (n=313)
More than 50% of my wine purchases are Colorado wine	9%	6%	9%
25% to 49% of my wine purchases are Colorado wine	12%	16%	15%
20% to 24% of my wine purchases are Colorado wine	12%	8%	16%
10% to 19% of my wine purchases are Colorado wine	13%	19%	17%
1% to 9% of my wine purchases are Colorado wine	29%	30%	27%
Less than 1% of my wine purchases are Colorado wine	20%	16%	13%
I do not purchase Colorado wine	5%	5%	4%

Share Colo wine	2019	2018	2017
25%+	21%	22%	24%
20%+	34%*	30%	39%*

*Rounding variance – not additive at whole decimals.

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.

Sub Groups – 20%+ Share of purchase allocation to Colo Wines	2019	2018	2017	Index to total 2019
Metro Denver – Future PI- Colo wines	32%	27%	37%	94
Weekly + Future PI - Colo wines	30%	28%	38%	88
Colo. Wine drinkers	34%	30%	39%	100
Age 21 – 35	50%	43%	53%	147
Age 36-50	34%	34%	43%	100
Age 51-70	25%	19%	27%	74
Male	32%	27%	41%	94
Female	35%	33%	38%	103
Hard Cider Drinkers	50%	44%	51%	147
Experimenters	34%	na	na	na

Insight: A younger, experimental drinker continues to be a good target for future Colo wine purchases.

Subgroups:

- More people are allocating 20% or more share of purchases to Colorado wines in many subgroups, though 2019 share is statistically at parity to 2018.
- More 21-35 drinkers & Hard Cider drinkers (50%) allocate a larger share of purchases to Colo wines – indexing higher (147) vs. the total.



WHERE BUY WINE:

Neighborhood liquor stores have the highest share of purchase locations for wine and Colorado wine.

- Neighborhood liquor stores make up close to 1/3 of wine purchase share of locations for both Colorado wine (30%) and wines in general (32%) during 2019. This has stayed statistically the same over time.
- Large, volume discount stores are wine purchase locations for 20% and 22% for Colo wines.
- Grocery/Member Warehouses grew in wine share purchase locations to 12% in 2019, up from 7% in 2018.

Share of Wine purchase locations in last year	All Wine	All Wine	All Wine	CO Wine	CO Wine	CO Wine
	2019	2018	2017	2019	2018	2017
	(n=505)	(n=500)	(n=500)	(n=323 CO wine drinkers)	(n=332 CO wine drinkers)	(n=313 CO wine drinkers)
Neighborhood liquor store	32%	36%	34%	30%	34%	31%
Large, volume discount liquor store	20%	24%	21%	22%	17%	17%
Restaurants	13%	10%	12%	13%	10%	11%
Grocery stores or Membership warehouses that sell wine*	12%	7%	7%	11%	4%	5%
Bars	5%	6%	6%	6%	3%	4%
Wine Club	4%	5%	na	5%	1%	na
Wine specialty shop	5%	4%	7%	5%	7%	8%
Winery or wine tasting room	4%	4%	5%	5%	17%	17%
Internet	2%	2%	5%	2%	1%	2%
Farmer's markets	1%	1%	1%	1%	3%	3%

Insight:

Continuing to focus on distribution for Colorado wines at neighborhood liquor stores, restaurants and large-volume discount stores is important.

Q. 4 What percent of all the wine you bought, during the last year or so, was from the following retail locations? *Grocery store/ membership warehouse combined in 2019

Q 15 What percent of all the Colorado wine you consumed or bought, during the last year or so, was from the following locations?

WHERE IS OCCASION OPPORTUNITY?

Restaurants offer opportunity for Colo wines.

- Gaps in 2019 (as in 2018 and 2017) continue to be quite large for popular wine drinking occasions – restaurants, home entertaining guests and while cooking. 79% consume wine at restaurants, however, only 53% would consider consuming Colo wine at a restaurant – a gap of 26 percentage points.
- Less frequent occasions like holidays and vacations also are opportunities for Colo wines.
- Occasions with fewer wine drinkers participating, are more of a fit for Colo wines – outdoors and a gift for co-worker/friend.

Insight: Occasion-based advertising for Colorado wines may help expand where consumers perceive Colorado wines to “fit.”

Total Sample	2019 Occasions consumed wine	2019 Occasions consider including CO wine	2019 Gap (% points)
For a holiday meal or special occasion	82%	49%	-33
At a restaurant before or with a meal	79%	53%	-26
At home alone, while relaxing, reading or some activity w/o food	69%	53%	-16
At home entertaining guests	73%	52%	-21
While on vacation	72%	44%	-28
Taking to a friend’s house for a meal or party	66%	52%	-14
At home while cooking	64%	46%	-18
Outdoors – picnic or BBQ	42%	43%	1
As a gift for a co-worker or casual friend	42%	47%	5

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

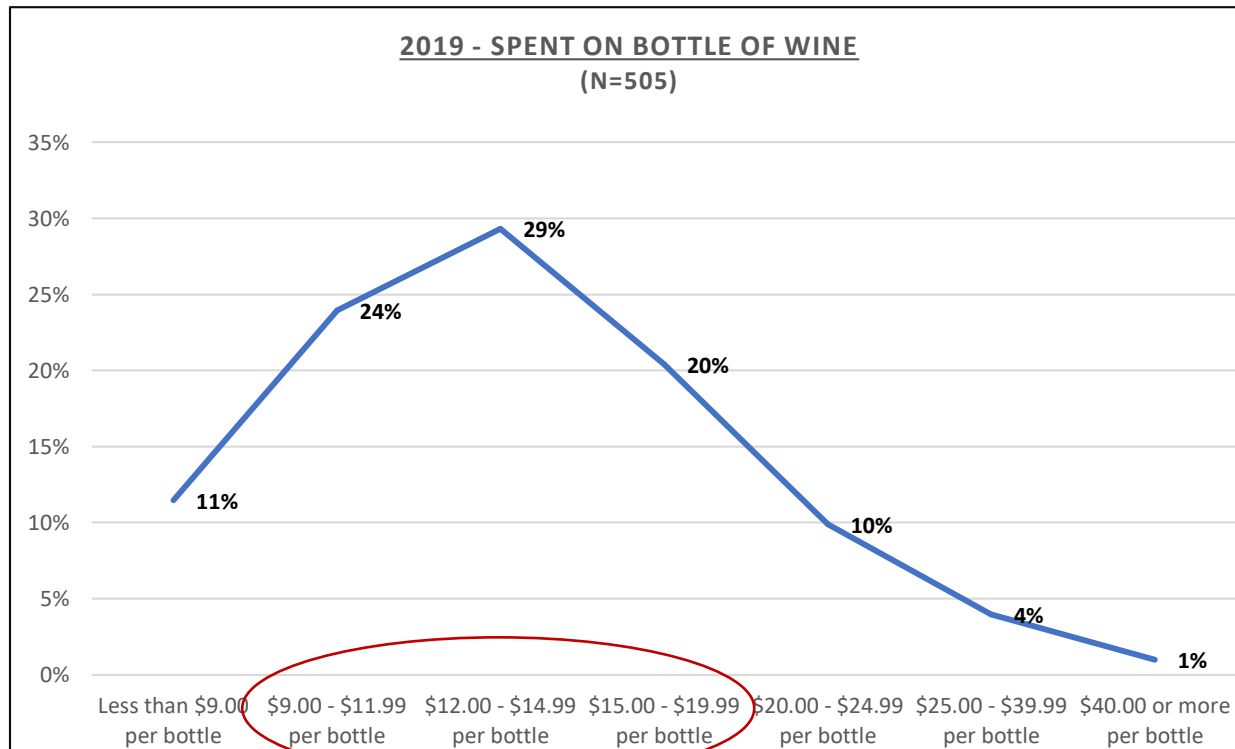
Q 16. At which of the following occasions would you consider including **Colorado wine** over the next year or so? (check all that apply)

PRICING SWEET SPOT:

\$9-\$14.99 is what the majority of people pay for wine in general:

- 29% pay \$12-\$14.99 per bottle of wine.
- Very few pay \$25 or more per bottle.

Insight: Optimal pricing is under \$15 per bottle.



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

“PRICED FAIRLY” PERCEPTION:

Significantly fewer people believe European wines (44%) are fairly priced:

- Similar numbers of respondents believe both California and Colorado wines are fairly priced; 68% and 67%, respectively. This is significantly higher vs. European wines.
- 54% believe European wines are over priced.

Price/Quality for Wine (total sample)	2019 Priced Fair	2019 Over priced (%T2 Box)
European	44%	54%
California	68%	40%
Colorado	67%	29%

Among the total sample, Colo wine “priced fairly” is significantly down vs. 2017.

- Most sub groups continue to trend down slightly (though not significantly) in 2019 vs. 2018 in terms of the number of people that believe Colorado wines are fairly priced.
- Females, hard cider drinkers and Ages 21-35 index higher than the total in terms of believing Colo wines are priced fairly.

Value – Colo. Wine Priced Fairly (%)	2019	2018	2017	2019 Index to total
TOTAL – Colo. Wine priced fairly	67%	69%	74%	100
Metro Denver – priced fairly	68%	71%	77%	101
Weekly +	62%	66%	71%	93
Colo. Wine drinkers	67%	68%	73%	100
Age 21 - 35	69%	72%	72%	103
Age 36-50	67%	69%	78%	100
Age 51-70	64%	63%	72%	96
Male	59%	65%	68%	88
Female	72%	73%	77%	107
Hard Cider Drinkers	72%	62%	72%	107

Insight: Price –Value is a key factor in driving purchase interest of Colorado wines. If price is seen as too high, this will negatively influence trial rates.

Q. 13 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. 5 pt scale

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.

QUALITY PERCEPTION - NEEDS SHORING UP:

Quality perception of Colorado wine continues to be lower than other wines.

- Quality perception of Colo wines continues to decline over time; significantly so in 2019.

Quality of wine (T2 Box %)	2019	2018	2017
European wines	89%	83%	85%
California wines	80%	79%	79%
Colorado wines	39%	45%	50%

*NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.*

Insight:

Giving reasons to believe (RTBs) for quality in consumer messaging – might help improve scores and close the gap to California and European wines' quality perceptions.

Significantly fewer Frequent / Weekly + wine drinkers perceive Colorado Wines to be good quality.

- Very low percentages of respondents in subgroups perceive Colorado wine to be quality. All are down from 2017 and many significantly so.
- As comparison, California is 80% T2 Box among the total sample (vs. 39% T2 Box for Colo wines).

Sub Groups – Quality of Colo. Wines (%T2 Box)	2019	2018	2017	Index to total 2018
Total– Quality of Colo. Wine (% T2 Box)	39%	45%	50%	100
Metro Denver	40%	43%	49%	103
Weekly +	38%	47%	53%	97
Colo. Wine drinkers	48%	51%	62%	123
Age 21 - 35	39%	46%	51%	100
Age 36-50	46%	45%	56%	118
Age 51-70	36%	44%	46%	92
Male	40%	45%	53%	103
Female	39%	45%	49%	100
Hard Cider Drinkers	43%	51%	57%	110
Total – Quality of California Wines (% T2 Box)	80%	79%	79%	100

Q. 11 Select the statement that best describes your opinion and impression regarding the quality of wines from each of the following geographic areas. 5 pt scale

*NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.*

HOW CAN WE MOVE THE NEEDLE?

Unfamiliarity, Awareness (20%) and preference for other wines are barriers to purchase on an open-ended basis.

- 16% indicate they prefer other brands – a rejection of Colo wines.
- Pricing is an issue among 16%.
- Availability is also an issue – 10%.

When aided, unable to find Colo wine - comes up as a barrier.

- 32% say they cannot find Colo wines; significantly more vs. 2018 (24%).
- 20% say Colo wines are too expensive.
- 20% indicate Colo wines don't have prestige or imagery as other wines.
- 13% believe they don't taste good (quality).

Why don't you consume or purchase more Colorado wines?	%
Open-end – 2019 (n=490)	
Not familiar with it/Never heard of it	20%
Prefer/Satisfied with other wines/wines from other region	16%
Sounds / expensive	16%
Prefer to try different varieties/wines from different locations in US	10%
Not available/Don't see it on the market	10%
Not good quality	8%
It's local/Prefer foreign wine	6%
Not enough variety available in Colorado	6%

Why you don't consume or purchase more of Colorado wines (aided list)	2019 TOTAL SAMPLE (n=505)	2018 TOTAL SAMPLE (n=500)
I cannot find Colorado wines where I purchase or consume wine	32%	24%
Colorado wines don't have the prestige or same imagery as other types of wine I usually like to buy	20%	16%
Colorado wines are too expensive	20%	17%
I hear, or believe that Colorado wines don't taste good	13%	11%
I hear, or believe that Colorado does not grow good grapes for wine production	13%	10%
I hear, or believe that Colorado wines taste too fruity	6%	9%
I hear, or believe that Colorado wines are too sweet	9%	8%
The labels are not attractive on Colorado wines.	2%	3%

Insight:

- Visibility and findability at retail is paramount – just having Colorado wine on the shelf does not mean people will be aware of it.
- Prestige (or quality) of Colorado wines is in question – developing a quality brand image for Colo Wines is important – beyond building awareness.

OPINIONS OF COLORADO WINES:

75% of Consumers believe the Colorado wine industry has potential for future growth.

- 72%+ agree with the following:
 - CO wine industry has potential for future growth
 - Restaurants that feature local food should feature local wines.
 - Interest in visiting Colo wineries
 - Like to experiment / taste wines from different regions

Total Sample	2019	2018	2017
% Top 2 Box – 5 pt. scale (Strongly, Somewhat Agree)	(n=505)	(n=500)	(n=500)
I believe there are quality wines made in Colorado	66%	65%	73%
I can easily find Colorado wine at my local wine shop or liquor store	40%	42%	48%
I like to buy Colorado and support local growers	66%	67%	77%
I like to buy wine with the Colorado Proud logo on the label	40%	43%	na
I think Colorado wines are too sweet	16%	16%	na
I think of wines made in Colorado in the same way I do locally grown produce	52%	54%	60%
Craftsmanship is apparent in Colorado wines	40%	43%	49%
I am interested in visiting Colorado wineries	72%	71%	75%
I am interested in Colorado wine tasting events	69%	66%	73%
I see and hear more and more about Colorado wines than I used	41%	40%	44%
I think the Colorado wine industry has potential for future growth	75%	75%	83%
Restaurants that feature locally grown food should also feature local wines	75%	73%	82%
Grapes in Colorado are exposed to cooler nights and hotter days which leads to better wines	34%	39%	43%
I like to experiment and taste different styles of wine and wines from different regions	72%	70%	81%
I can easily order Colorado wine online. NEW IN 2018	27%	27%	na

Insight: Targeting locally grown restaurants is a great way to feature Colo wine and gain sampling and trial with only a glass purchase vs. a higher risk bottle purchase in off premise accounts.

Q.21 What are your opinions and impressions of Colorado wines?

SEGMENTS:

- Among wine drinker segments, Enthusiast, Savvy and Satisfied Sippers remain the largest groups.
- Of the segments below, Traditionalist, Overwhelmed and Image are too small to read as a separate group.
- There are significantly more Satisfied Sippers in 2019 (32%) vs. 2018 (25%).

SEGMENTS N=2019 sample	Among the total sample	% Total 2019 (n=505)	% Total 2018 (n=500)
Traditionalist (n=33)	I tend to drink a range of wines from established, well-known wineries.	7%	13%
Enthusiast (n=147)	I feel comfortable with my knowledge of wine, which might be more than the average wine drinker. I like to take my time to browse the wine section to seek out new and interesting wines.	29%	30%
Overwhelmed (n=46)	I am sometimes a little overwhelmed or confused by all the choices on a wine list or at a liquor store, which leaves me at a loss as to what kind of wine I want to buy or drink.	9%	11%
Savvy (n=97)	I enjoy shopping at different stores in search of the best deals and discovering new wines. I always have a few favorites to fall back on to supplement my discoveries.	19%	20%
Satisfied Sipper (n=161)	I feel that I don't know a lot about wine, but I do know what wines I like. I tend to drink the same wines that I know I like.	32%	25%
Image (n=21)	I sometimes use the Internet to seek out highly-rated wines, new innovations and to learn more about wines. I am often the first among my friends to try a wine.	4%	1%

RECOMMENDATIONS

Build awareness by trying different tactics.

- Awareness of Colo wines overall and in the Denver Metro area is flat. Further, awareness is on par in non-Metro Denver areas where ad spending is not focused.
- Disrupt the messaging patterns by trying new communication and awareness-building tactics as current tactics are holding awareness steady, but not increasing it.
- Continue frequent event sampling, on and off premise Colorado wine tasting events and other tactics to build awareness and trial.



Target neighborhood liquor stores with awareness-building communication.

- Neighborhood liquor stores have the highest share of wine purchases. Consider developing off premise point of sale materials for smaller channels (neck hangers, Colorado wine posters, wine description cards, food pairing information), findability signage for retail – see right.
- Restaurants are a key trial on premise channel – as consumers can taste Colo wines by the glass; which is a lower investment risk vs. a bottle.



RECOMMENDATIONS

Increase quality perceptions of Colorado wines.

- **Public relations:** Continue to gain press and positive media in Colorado publications. Promote award-winning Colorado wines.
- **Events:** Getting the word out on upcoming wine tasting events is key to trial.



Photo courtesy of the Colorado Wine Industry

13 Award-Winning Colorado Wines You Should Be Drinking Now

These wines were selected as part of the 2018 Governor's Collection, which means they're some of the best bottles in the state.

BY ASHLEY HAUSMAN | SEPTEMBER 21, 2018

- **Advertising:** Give wine drinkers "reasons to believe" Colo wines are high quality.

Forbes

4,939 views | May 25, 2016, 10:53am

Wine In Colorado: Where Cool Climate Grapes Are The New Hot



Cathy Huyghe Contributor

Food & Drink

I write about the people, business and politics of the wine industry.



RECOMMENDATIONS

Develop retention, loyalty and re-purchase programs.

- Recall, conversion from people who have tried Colorado wines to regular use is very low. Purchase Intent is 63%+ so people are not opposed to purchasing it in the future. Slide 13.
- Consider “repeat” purchase programs. Getting those who have tried Colo wines to repeat purchase. Consider loyalty programs or a passport program where trying Colo wines from different wineries – and punching the passport with wineries from different geographies is the goal. Consider prizes for completed passports – from sampling different wines.

Define occasion fit for Co wines.

- The percent of people drinking wine at various occasions / locations is significantly higher than where they would consider including Colo wines.
- Restaurants, at home relaxing, entertaining guests or cooking are popular wine consumption occasions, however, not as much a consideration for inclusion of Colorado wines. Slide 17.
- Consider defining usage occasions through occasion-based advertising, public relations messaging.



RECOMMENDATIONS

Target message tonality to younger, 21-35 more experimental wine drinkers.

- More of them drink wine.
- More of them allocate 20%+ share to Colorado wines.
- More of them (vs. other ages) like to experiment, discover the new (and share their experiences vis social media) & be “in the know.”
- More of them are interested in supporting local growers and in visiting local wineries.
- Consider promotions that leverage experiences and experimentation – popular themes among Millennials. A wine version of a Pub Crawl – where consumers can taste various wines from Colorado. Perhaps a bicycle tour of wineries – the Sonoma version in Colorado – consumers enter to win prizes.
- Use social media outlets for messaging; as they are highly participated venues for younger demo.



DETAILED FINDINGS

Total Sample

Past month wine drinkers, living in Colorado

WHO ARE WINE DRINKERS?

Wine drinkers drink all kinds of alcohol:

- The number of wine drinkers that also drink beer and spirits was up significantly in 2018 vs. 2017; however fell to 73% in 2019, significantly fewer vs. 2018.
- Hard cider penetration among wine drinkers is flat at 25% in 2019 vs. 25% in 2018.

Past month wine drinkers	2019 % also consume other alcohol (n=505)	2018 % also consume other alcohol (n=500)	2017 % also consume other alcohol (n=500)
Wine	100%	100%	100%
Beer	73%	79%	66%
Liquor - Mixed drinks (whiskey, vodka, rum, scotch, gin, tequila, etc.)	71%	70%	62%
Hard Cider	25%	26%	23%

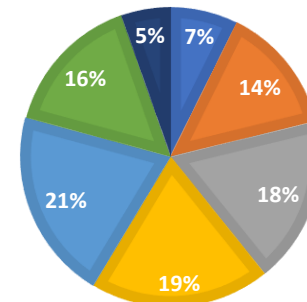
Income 2019 higher vs. 2017:

- 56% of 2019 wine drinkers have household incomes of \$75k+; statistically at parity to 2018 (54%), but statistically higher vs. 2017.

Income	2019 (n=505)	2018 (n=500)	2017 (n=500)
Less than \$75K	39%	41%	50%
More than \$75k	56%	54%	47%

2019 HOUSEHOLD INCOME
(N=505)

- Under \$30,000
- \$30,000-\$49,999
- \$50,000-\$74,999
- \$75,000-\$99,999
- \$100,000-\$149,999
- \$150,000 or above
- Prefer not to answer



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?

Bold red font = significantly different vs. previous year at the 95% confidence level.

DEMOGRAPHICS OF WINE DRINKERS

Age, Education & Gender

- In 2019, education makeup of the total sample is on par with 2018.
- Age and gender targets were set in 2019 so that the respondent mix is similar to 2017 and 2018.

AGE	2019 (n=505)	2018 (n=500)	2017 (n=500)
21-35	31%	33%	36%
36-50	27%	27%	27%
51-70	42%	40%	37%

GENDER	2019 (n=505)	2018 (n=500)	2017 (n=500)
Male	43%	47%	35%
Female	57%	53%	65%

Education- % total sample	2019	2018	2017
	(n=505)	(n=500)	(n=500)
Some high school	0%	1%	0%
Graduated high school	6%	6%	7%
Some College	16%	19%	18%
Graduated 2 year college	8%	9%	10%
Graduated 4 year college	41%	37%	42%
Post graduate degree – masters or doctorate	27%	28%	23%

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.

Bold red font = significantly different vs. previous year at the 95% confidence level.

SEGMENTS OF WINE DRINKERS:

- Among wine drinker segments, Enthusiast, Savvy and Satisfied Sippers remain the largest groups.
- Of the segments below, Traditionalist, Overwhelmed and Image are too small to read as a separate group.
- There are significantly more Satisfied Sippers in 2019 (32%) vs. 2018 (25%).

SEGMENTS Total 2019 (n=505)	Among the total sample	% Total 2019	% Total 2018
Traditionalist (n=33)	I tend to drink a range of wines from established, well-known wineries.	7%	13%
Enthusiast (n=147)	I feel comfortable with my knowledge of wine, which might be more than the average wine drinker. I like to take my time to browse the wine section to seek out new and interesting wines.	29%	30%
Overwhelmed (n=46)	I am sometimes a little overwhelmed or confused by all the choices on a wine list or at a liquor store, which leaves me at a loss as to what kind of wine I want to buy or drink.	9%	11%
Savvy (n=97)	I enjoy shopping at different stores in search of the best deals and discovering new wines. I always have a few favorites to fall back on to supplement my discoveries.	19%	20%
Satisfied Sipper (n=161)	I feel that I don't know a lot about wine, but I do know what wines I like. I tend to drink the same wines that I know I like.	32%	25%
Image (n=21)	I sometimes use the Internet to seek out highly-rated wines, new innovations and to learn more about wines. I am often the first among my friends to try a wine.	4%	1%

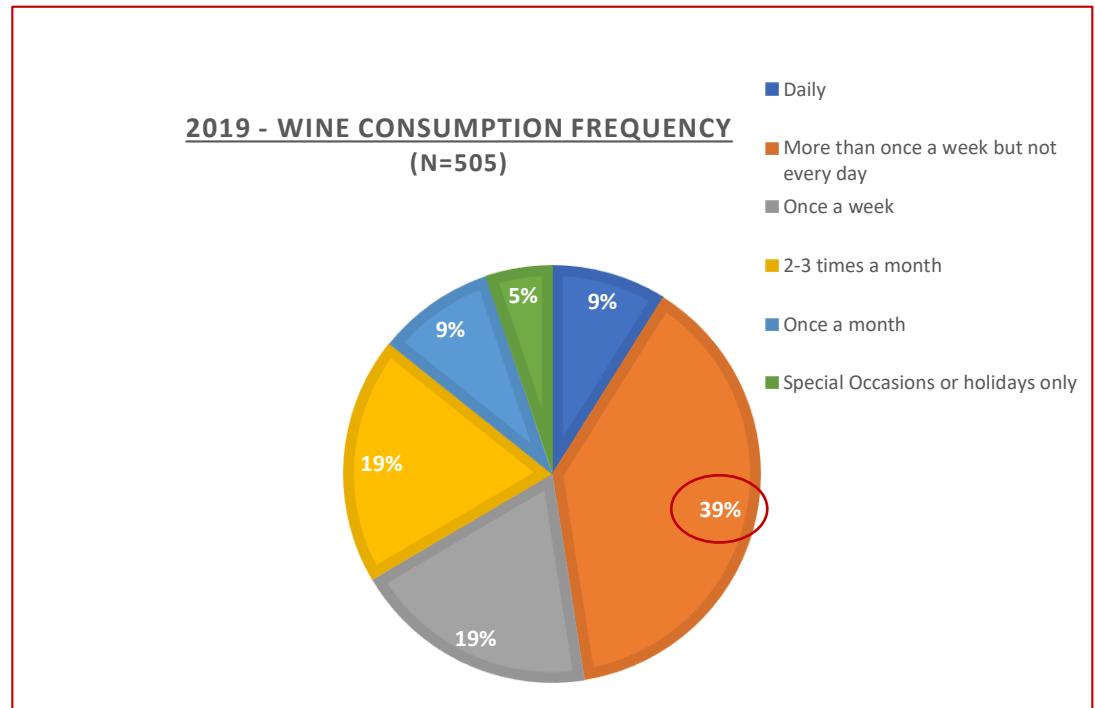
Q. 8 When you drink or purchase wine - which of the following statements describes you the best?

Bold red font = significantly different vs. previous year at the 95% confidence level.

FREQUENCY OF WINE CONSUMPTION

- In 2019 and with previous tests, targets were set to ensure the incidence of respondents' wine consumption frequency was similar to past tests for an “apples to apples” comparison. Targets were set based on previous tests where consumption frequency fell naturally within the sample.
- In 2019, 67% of the sample consumes wine weekly or more often, similar to 2018, 70%.
- The largest group, 39% consume wine more than once a week, but not daily.

Wine consumption frequency	2019 (n=505)	2018 (n=500)	2017 (n=500)
Weekly or more often	67%	70%	69%
Less than weekly	33%	30%	31%



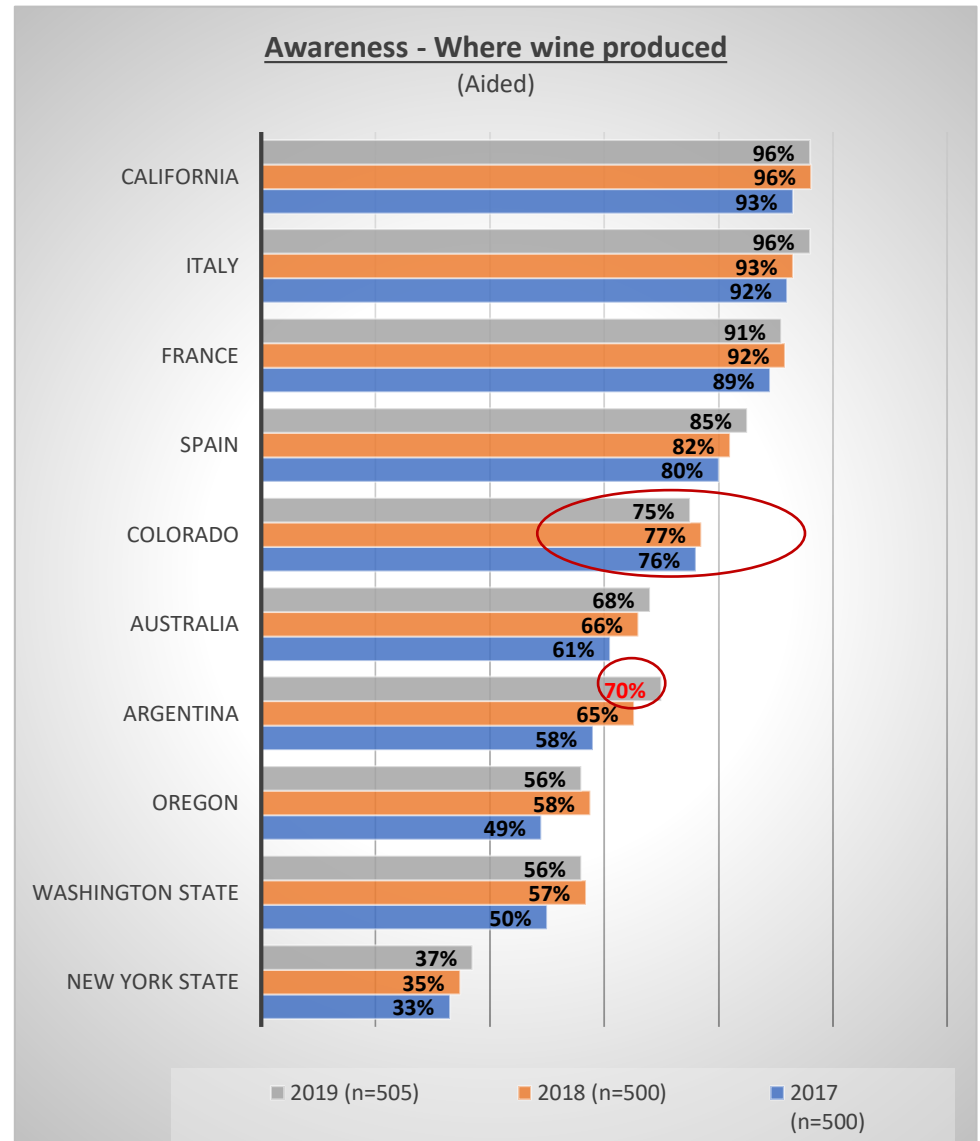
Q.S6 On average, how often do you drink wine?
Note: Total sample = consumed wine in past month

AWARENESS – WINE PRODUCTION GEOGRAPHY

- Aided Awareness of wine from most geographies is on par to 2018. The exception is Argentina, significantly up to 70% awareness in 2019 from 65% in 2018.
- 75% of Colorado wine drinkers know wine is produced in Colorado; statistically at parity to 2018 (77%).
- California wine awareness is on par with Italy (96%) and both are significantly higher vs. Colorado wine awareness.

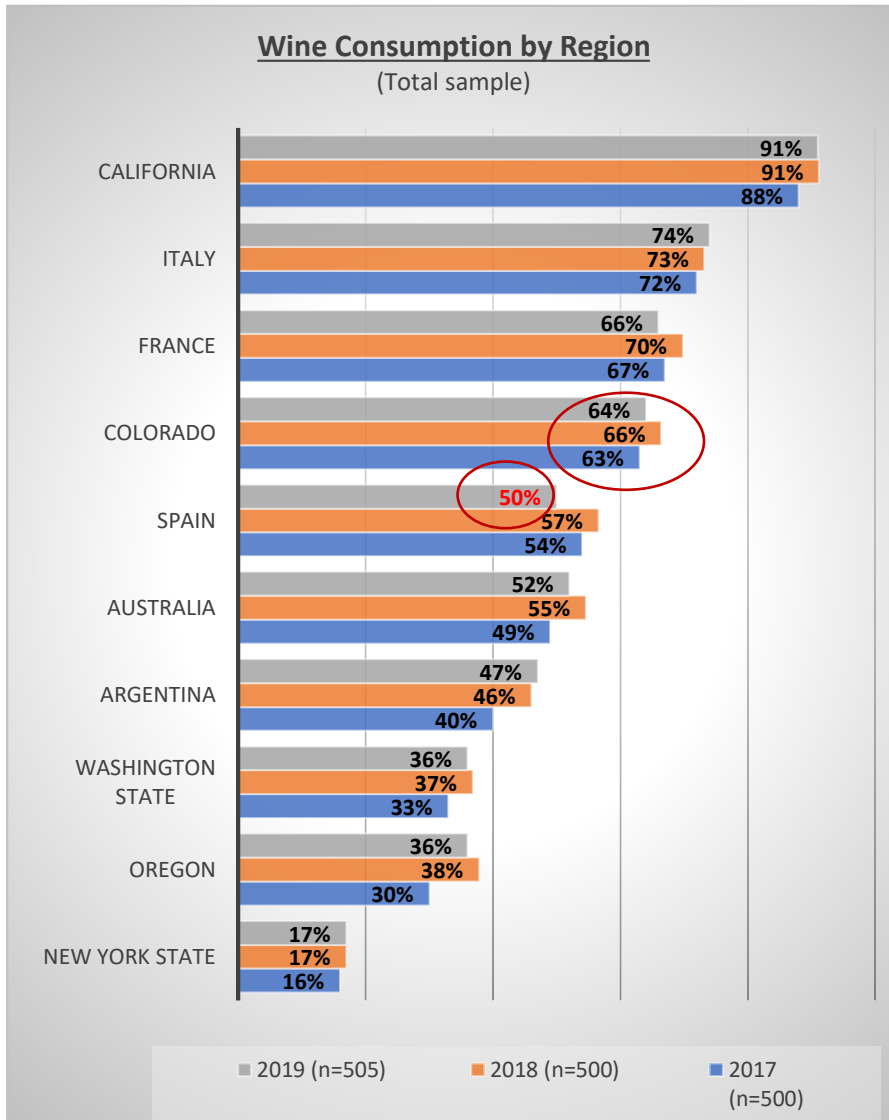
• California has very strong top of mind awareness, with First Mentions for unaided awareness among 64% of the sample in 2019.

First Mention – Open end, Unaided Awareness			
	2019	2018	2017
Cali, Napa, Sonoma	64%	63%	56%
France	10%	10%	13%
Italy, Tuscany	12%	10%	10%
Colo, West Slope, Grand Jct., Palisade	5%	6%	6%



NOTE: significant differences vs. previous year - noted in **Bold red font** at the 90% confidence level.

WINE CONSUMPTION BY GEOGRAPHY



- Wine consumption is flat in most geographies, with no statistical difference vs. previous years.
- The exception is Spain – down to 50% consumption penetration among Colorado wine drinkers in 2019; down significantly from 57% in 2018.
- Colo wine consumption is 64% in 2019, statistically the same as 2018 (66%).
- Most geographies are still lagging California wines in consumption (91%).

- Colorado wine conversion from those aware of Colo wine to trial / consumption is 2nd to only California wines – 86%.
- Though is still less than California – 95% of those aware of Cali wine have consumed it.

2019- Conversion to consumption among those aware		
	2019	2018
California	95%	94%
Colorado	86%	86%
Italy	78%	79%
Australia	77%	83%
France	73%	76%
Argentina	67%	71%
Oregon	64%	65%
Washington State	65%	64%
Spain	59%	74%
New York State	46%	49%

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

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

SHARE OF WINE PURCHASE LOCATIONS

Neighborhood liquor stores have the highest share of purchase locations for wine and Colorado wine.

- Neighborhood liquor stores make up close to 1/3 of wine purchase share of locations for both Colorado wine and wines in general. This has stayed statistically on par over time.
- Large, volume discount stores are wine purchase locations for 20% and 22% for Colo wines.
- Grocery/Member Warehouses grew in wine share to 12% in 2019, up from 7% in 2018.

Share of Wine purchase locations in last year	All Wine	All Wine	All Wine	CO Wine	CO Wine	CO Wine
	2019	2018	2017	2019	2018	2017
	(n=505)	(n=500)	(n=500)	(n=323 CO wine drinkers)	(n=332 CO wine drinkers)	(n=313 CO wine drinkers)
Neighborhood liquor store	32%	36%	34%	30%	34%	31%
Large, volume discount liquor store	20%	24%	21%	22%	17%	17%
Restaurants	13%	10%	12%	13%	10%	11%
Grocery stores or Membership warehouses that sell wine*	12%	7%	7%	11%	4%	5%
Bars	5%	6%	6%	6%	3%	4%
Wine Club	4%	5%	na	5%	1%	na
Wine specialty shop	5%	4%	7%	5%	7%	8%
Winery or wine tasting room	4%	4%	5%	5%	17%	17%
Internet	2%	2%	5%	2%	1%	2%
Farmer's markets	1%	1%	1%	1%	3%	3%

Q. 4 What percent of all the wine you bought, during the last year or so, was from the following retail locations? *Grocery store/ membership warehouse combined in 2019

Q 15 What percent of all the Colorado wine you consumed or bought, during the last year or so, was from the following locations?

WHERE EXPECT TO BUY COLO WINE

- Most wine drinkers (68%) expect to find Colorado wines at their neighborhood liquor stores.
- Winery or wine tasting rooms are locations where 60% of wine drinkers expect to buy Colorado wines.
- Selection and Convenience continue to be drivers that influence larger numbers of wine purchasers on where to purchase wine.
- Scores are trending statistically flat over time.

Where expect to buy CO wines (Among total sample)	2019 (n=505)	2018 (n=500)	2017 (n=500)
Neighborhood liquor store	68%	70%	70%
Winery or wine tasting room	60%	57%	59%
Wine specialty shop	49%	54%	58%
Large, volume discount liquor store	48%	47%	46%
Restaurants	48%	45%	48%
Grocery stores or Membership warehouses that sell wine*	38%	31%	33%
Farmer's markets	33%	36%	38%
Bars	32%	29%	31%
Wine Club	21%	24%	-
Internet	20%	19%	19%

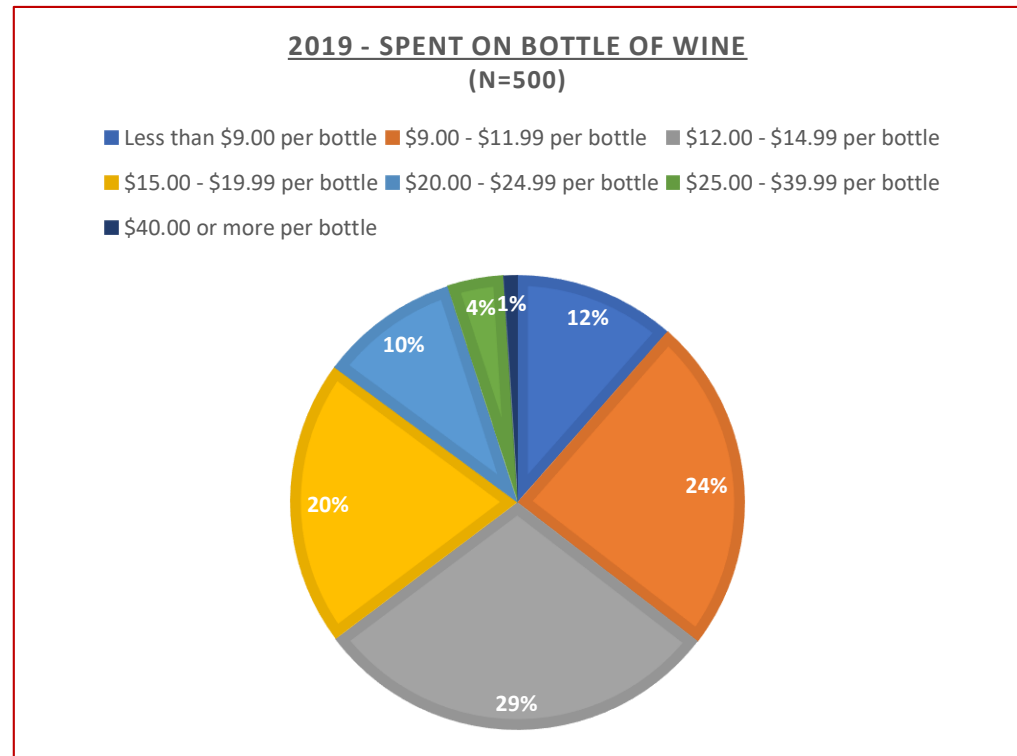
Wine purchase location decision factors	2019 (n=505)	2018 (n=500)	2017 (n=500)
Selection	65%	69%	69%
Convenience	59%	59%	58%
Knowledgeable staff or other reliable source of information about the wines	36%	37%	36%
Supporting local businesses	33%	37%	34%
Quality of service	27%	26%	30%
Where I do other shopping	36%	na	na

Q. 17 Where would you expect to buy **Colorado wines**? (check all that apply) *Grocery store/ membership warehouse combined in 2019
 Q. 6 Other than price, what factors influence where you most like to purchase wine? (check all that apply)

SPEND AMOUNT ON WINE

- Most (64%) continue to spend less than \$15 per bottle.
- 29% spend \$12 - \$14.99 per bottle in 2019, significantly lower vs. 35% in 2018.
- 35% typically spend less than \$12 per bottle in 2019.

	2019	2018	2017
Total	N=505	N=500	N=500
Less than \$9.00 per bottle	11%	10%	11%
\$9.00 - \$11.99 per bottle	24%	24%	25%
\$12.00 - \$14.99 per bottle	29%	35%	31%
\$15.00 - \$19.99 per bottle	20%	19%	19%
\$20.00 - \$24.99 per bottle	10%	7%	8%
\$25.00 - \$39.99 per bottle	4%	3%	4%
\$40.00 or more per bottle	1%	2%	2%



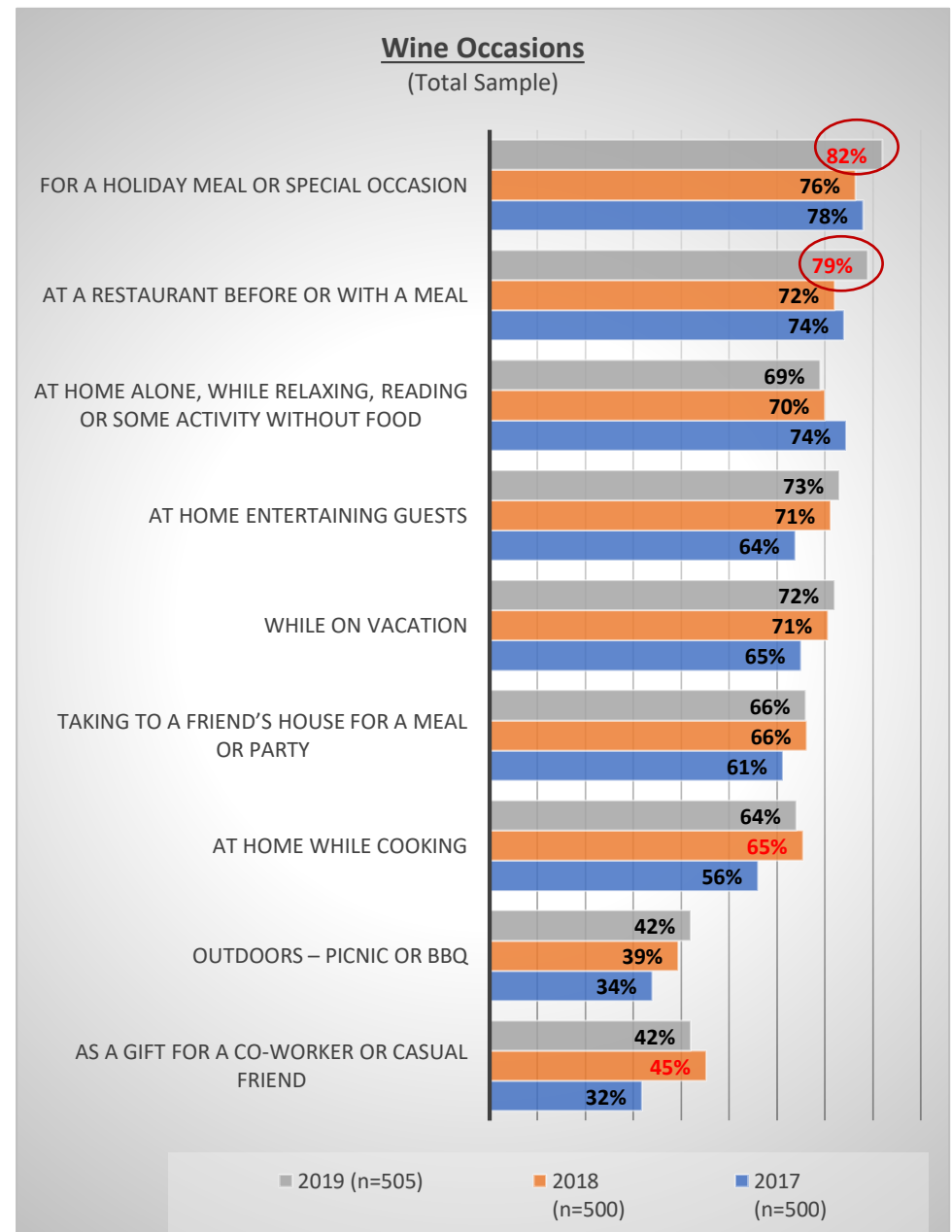
Q. 5 How much do you typically spend on a standard (750 ml) bottle of wine at a liquor store, a grocery store, or a specialty wine shop?

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

OCCASIONS FOR WINE

- 2019 respondents continue to participate in a wide variety of wine occasions.
- Significantly more consumers are participating in wine consumption at Restaurants (79% vs. 72%) and Holidays (82% vs. 76%) in 2019 vs. 2018, noted in red numbers in the chart to right.
- Holiday continues to be the most popular wine occasion – 82% participation in 2019, however, holidays or special occasions are most likely not frequently occurring events.
- Restaurant wine occasions are also frequented by 79% and likely occur more frequently vs. holidays.

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



NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

OCCASIONS FOR WINE VS. COLO WINE

Most popular wine consumption occasions do not “fit” Colo wines, for many drinkers.

- When comparing wine occasions vs. occasions where drinkers would consider Colo wines, gaps in 2019 (as in 2018) continue to be quite large for holidays, restaurants, vacations and at home cooking and entertaining guests. See red boxes in chart below.
- 79% drink wine at a restaurant, but only 53% would consider drinking a Colorado wine at a restaurant – gap of 26 percentage points in 2019.
- Most percentage point gaps grew larger in 2019 vs. 2018, particularly among occasions where a larger percent of wine drinkers participate in.
- Occasions with fewer participating are a fit for Colo wines – outdoors and a gift for co-worker/friend; where gaps are small.

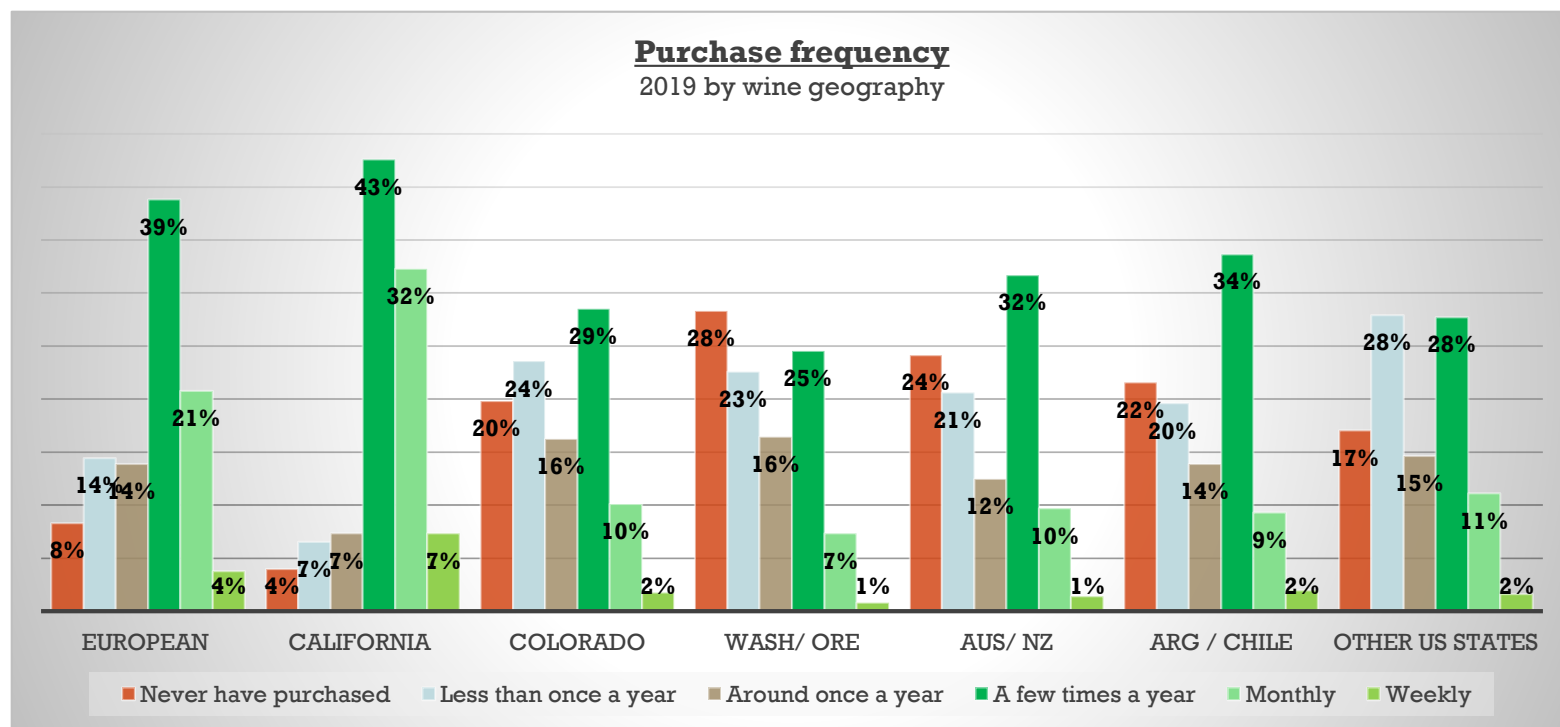
Total Sample	2019 Occasions consumed wine	2019 Occasions consider including CO wine	2019 % Point Gap	2018 Occasions consumed wine	2018 Occasions consider including CO wine	2018 % Point Gap
For a holiday meal or special occasion	82%	49%	-33%	76%	50%	-27%
At a restaurant before or with a meal	79%	53%	-26%	72%	51%	-21%
At home entertaining guests	73%	52%	-21%	70%	55%	-15%
While on vacation	72%	44%	-28%	71%	55%	-17%
At home alone, while relaxing, reading or some activity w/o food	69%	53%	-16%	71%	42%	-29%
Taking to a friend’s house for a meal or party	66%	52%	-14%	66%	54%	-13%
At home while cooking	64%	46%	-18%	65%	45%	-21%
Outdoors – picnic or BBQ	42%	43%	1%	39%	38%	-1%
As a gift for a co-worker or casual friend	42%	47%	5%	45%	46%	1%

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

Q 16. At which of the following occasions would you consider including **Colorado wine** over the next year or so? (check all that apply)

FREQUENCY OF WINE PURCHASED BY REGION

- More wine drinkers purchase wines from California weekly and monthly & a few times a year (noted in green bars in chart below).
- European wine is purchased 2nd most often, behind Cali wines.
- So. American, Argentina and Chile wines along with Australia and New Zealand are purchased by many a few times a year.
- Colorado wines have more people purchasing them on a less frequent basis.



Q. 9 How often do you typically purchase wine from each of the following geographic areas? (check one timeframe that describes you best)

FREQUENCY OF WINE PURCHASED OVER TIME

- More wine drinkers consume wines from various geographies “a few times a year” - European wine is consumed a few times a year by 39% of wine drinkers. California wines by 43%.
- Colorado wine is consumed “a few times a year” by 29% of wine drinkers in 2019 and is the same over time.
- 20% say they have never purchased Colo wine in 2019; statistically the same over time.

% wine drinkers	Weekly			Monthly			A few times a year		
	2019	2018	2017	2019	2018	2017	2019	2018	2017
European wine (e.g. France, Italy, Germany, etc.)	4%	4%	4%	21%	16%	17%	39%	42%	42%
California wine	7%	8%	9%	32%	31%	32%	43%	46%	39%
Colorado wine	2%	5%	6%	10%	11%	14%	29%	28%	27%
Washington and Oregon wine	1%	3%	2%	7%	8%	11%	25%	25%	19%
Wine from US States other than CA, OR, WA and CO	2%	2%	3%	11%	7%	10%	28%	25%	23%
Australia and New Zealand wine	1%	3%	3%	10%	10%	14%	32%	33%	26%
South American wine (e.g. Argentina, Chile, etc.)	2%	3%	3%	9%	12%	13%	34%	31%	24%

% wine drinkers	Around once a year			Less than once a year			Never purchased		
	2019	2018	2017	2019	2018	2017	2019	2018	2017
European wine (e.g. France, Italy, Germany, etc.)	14%	15%	12%	14%	13%	14%	8%	9%	11%
California wine	7%	7%	7%	7%	5%	8%	4%	2%	4%
Colorado wine	16%	16%	14%	24%	20%	16%	20%	21%	23%
Washington and Oregon wine	16%	17%	16%	23%	18%	21%	28%	29%	32%
Wine from US States other than CA, OR, WA and CO	15%	16%	14%	28%	23%	25%	17%	27%	25%
Australia and New Zealand wine	12%	16%	15%	21%	16%	17%	24%	22%	25%
South American wine (e.g. Argentina, Chile, etc.)	14%	16%	16%	20%	16%	15%	22%	23%	30%

Q. 9 How often do you typically purchase wine from each of the following geographic areas? (check one timeframe that describes you best)

FUTURE PURCHASE INTEREST

- 63% indicate top 2 box purchase interest (definitely & probably will buy) in future Colorado wine purchases; statistically at parity to 2018 (64%).
- So. American wine future purchase interest is significantly down in 2019 (57% T2 Box) vs. 2018 (63% T2 box). *Note: Significant difference at the 90% confidence level.*
- California wine purchase interest remains highest 86% T2 Box PI.

% Top 2 box purchase intent (5 pt. scale)	2019	2018	2017
California wine	86%	86%	86%
European wine	78%	76%	78%
Colorado wine	63%	64%	68%
Australia or New Zealand	61%	63%	65%
So. American wine	57%	63%	60%
Washington or Oregon wine	57%	58%	54%
Wine from US states other than CA, OR, WA and CO	50%	46%	48%

NOTE: significant differences vs. previous year - noted in red font at the 90% confidence level.

2019 Future Purchase Interest by Geography

(Total Sample n=505)

- 53% state they will definitely purchase (top box) Cali wines. Only 10% indicate they may or may not purchase Cali wine; vs. 25% for Colo wine.
- Colorado wine purchase interest is 27% top box – definitely interested.
- Rejection / bottom box scores are low for all geographies.



■ Definitely will not buy
 ■ Probably will not buy
 ■ Might or might not buy
 ■ Probably will buy
 ■ Definitely will buy

IMPRESSIONS OF QUALITY BY REGION

- Quality impressions significantly improved for European wines (89% T2 Box); Very high quality and Somewhat above average quality.
- Colorado wines' quality perceptions are trending lower; significantly so in 2019 -39% T2 Box vs. 45% T2 Box in 2018 and 50% T2 Box in 2017.
- Colorado wines continue to be significantly lower in quality perception vs. European (89% T2 Box) and California wines (80% T2 Box). This is a large gap.

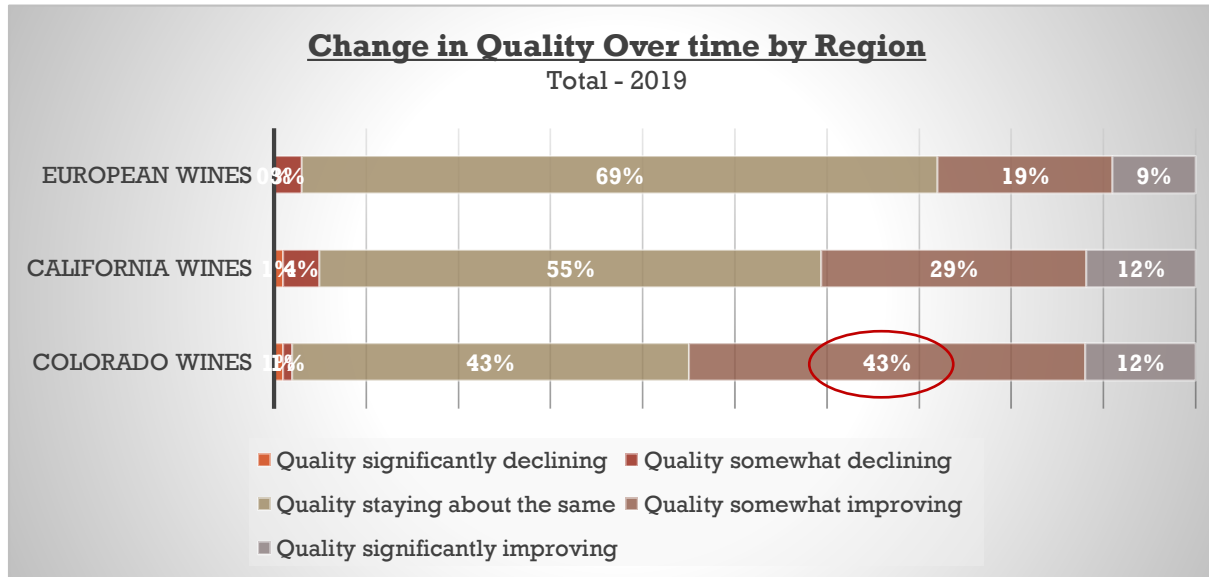
NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.

Quality of wine (T2 Box % – 5 pt. scale)	2019 T2 Box %	2018 T2 Box %	2017 T2 Box %
European wines	89%	83%	85%
California wines	80%	79%	79%
Colorado wines	39%	45%	50%

Q. 11 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. 5 pt. scale

CHANGE IN QUALITY IMPRESSIONS BY REGION

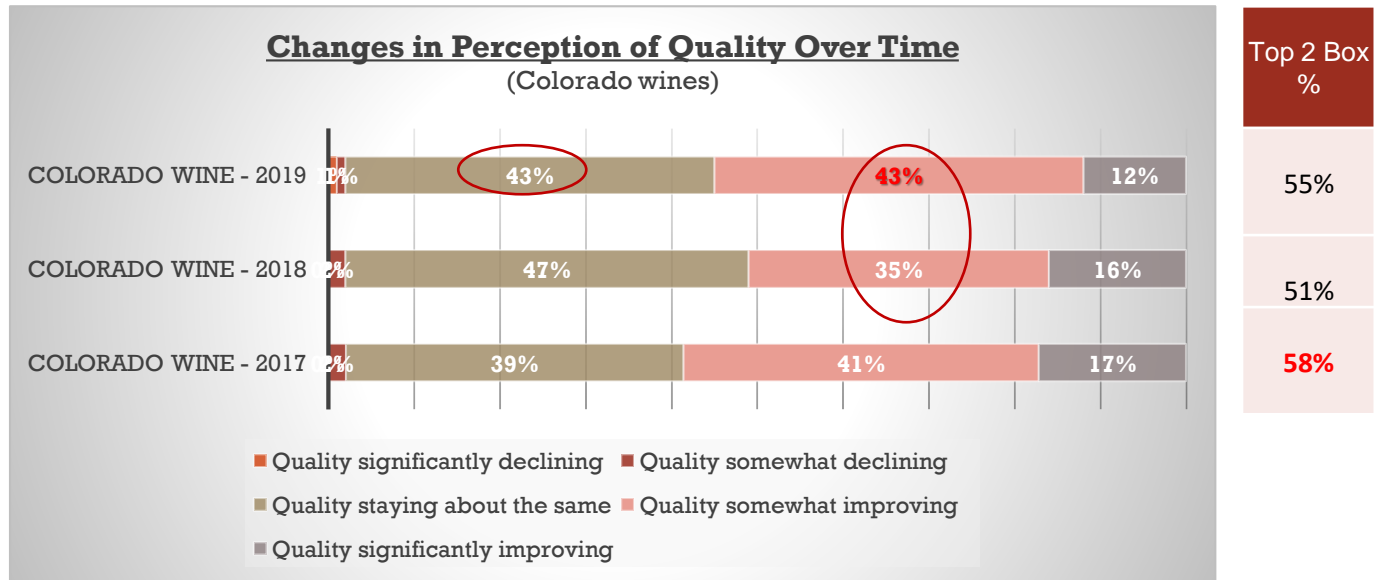
- 43% of wine drinkers believe Colorado wines are improving in quality.
- The majority of wine drinkers believe European(69%) and California (55%) wines' quality are staying the same.



Q. 12 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) 5 pt. scale

CHANGES IN QUALITY IMPRESSIONS FOR COLO WINES

- 43% of Wine drinkers in 2019 believe that Colorado wines are staying the same or improving somewhat.
- In 2018, 35% believed Colorado wines were somewhat improving – this is significantly lower than 43% in 2019.
- Top 2 Box scores are at parity for 2019 and 2018; 2017 was significantly higher (58% T2 Box) vs. 2018 (51%).



NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

Q. 12 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) 5 pt. scale

VALUE BY REGION

- 67% believe Colorado wines and 68% believe California wines are fairly priced in 2019. This is on par with previous years.
- European wines are thought to be somewhat and extremely overpriced by 54% of wine drinkers.
- Over time, "fairly priced" perceptions for both California and Colorado wines remain similar.

Total wine drinkers (n=500) Value	Extremely underpriced	Somewhat underpriced	Fairly priced	Somewhat overpriced	Extremely overpriced
European wine - 2019	0%	2%	44%	47%	7%
European wine - 2018	0%	1%	45%	47%	7%
European wine - 2017	0%	2%	43%	46%	9%
California wine - 2019	0%	1%	68%	37%	3%
California wine - 2018	0%	1%	69%	26%	4%
California wine - 2017	0%	2%	68%	27%	2%
Colorado wine - 2019	1%	4%	67%	26%	3%
Colorado wine - 2018	0%	2%	69%	24%	5%
Colorado wine - 2017	1%	4%	74%	19%	3%

Q. 13 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.

COLO WINE SHARE OF PURCHASES

- In 2019, 34% of Colorado wine purchasers indicate they allocate 20% + of their wine purchases to Colorado-produced wines. This is up slightly vs. 2018 (30%), though not significantly so.
- 49% - almost half of Colo wine drinkers say Colo wines are less than 9% of their total wine purchases. Said another way, among those who have tried and consumed Colo wines, almost half allocate a very small purchase share to Colo wines.

Percent of total Wine purchases – among CO. wine drinkers	2019 (n=323)	2018 (n=332)	2017 (n=313)
More than 50% of my wine purchases are Colorado wine	9%	6%	9%
25% to 49% of my wine purchases are Colorado wine	12%	16%	15%
20% to 24% of my wine purchases are Colorado wine	12%	8%	16%
10% to 19% of my wine purchases are Colorado wine	13%	19%	17%
1% to 9% of my wine purchases are Colorado wine	29%	30%	27%
Less than 1% of my wine purchases are Colorado wine	20%	16%	13%
I do not purchase Colorado wine	5%	5%	4%

share	2019	2018	2017
25%+	21%	22%	24%
20%+	34%*	30%	39%*

*Rounding variance – not additive at whole decimals.

NOTE: significant differences vs. previous year - noted in **red** font at the 90% confidence level.



PACKAGES AND SOURCE OF AWARENESS

- Two new questions were included in the 2019 survey, shown in charts below.
- 77% of respondents have consumed wine from a box.
- Among those who have consumed Colo wine, 65% heard about Colo wines in a liquor or wine store; 55% at a winery/wine tasting room and 49% from friends, family.

Package consume wine (total n=505)	2019
Boxed wine	77%
Wine in a can	33%
On tap wine /from a keg	27%
None of the above	16%

Where Heard about Colo Wine – Among those consumed (n=323)	2019
At a liquor store or wine store	65%
At a winery or wine tasting room	55%
Word of mouth - from friends, family, etc.	49%
Events, wine tasting	45%
At a restaurant	37%
Social Media	15%
Magazines	13%
Billboards / advertising	10%

Q. 14 From which of the following package types have you ever consumed wine? (new question in 2019)

Q. 15a Where have you seen or heard about Colorado wines? (new question in 2019)

REASONS FOR NOT CONSUMING/PURCHASING COLO. WINES

- Among the total sample, on an open ended basis, 20% state unfamiliarity as a reason why they don't drink or buy more Colorado wines. 21% said the same in 2018.
- 16% state rejection of Colo wines, writing that they prefer wines from other places. This was 17% in 2018.
- 16% also state Colorado wines are too expensive in 2018; 17% in 2018.
- 10% indicate a lack of availability in 2019; 14% in 2018.
- 10% state they prefer different varieties/ wines from other regions.

Why don't you consume or purchase more Colorado wines?	
Open-end – 2019 (n=490)	%
Not familiar with it/Never heard of it	20%
Prefer/Satisfied with other wines/wines from other region	16%
Sounds / expensive	16%
Prefer to try different varieties/wines from different locations in US	10%
Not available/Don't see it on the market	10%
Not good quality	8%
It's local/Prefer foreign wine	6%
Not enough variety available in Colorad	6%
Didn't like any of their wines/Dislike Colorado	5%
Lack of need/Not much interested in buying from Colorad	5%
Poor taste/Not my flavor	4%
Poor past experience	3%
Don't drink alcohol enoug	2%
Too sweet	2%
Don't drink lot of win	1%
Not conveniently located	1%
No advertisement/promotion for this brand	1%
Not a good value for money	1%
Tastes dry	1%
Doesn't seem like a grape growing area	1%
Colorado native	1%
Other neutral mentions	1%
Don't like fruity taste	1%
Not sweet enough	1%
Not easy/convenient to buy	1%
Not easy to identify the production location on the label	1%
Depends on mood/need	1%
Depends on price	1%

Q 19. Why don't you consume or purchase more Colorado wine? Open end

CONSUMING MORE COLO WINES

- When asked why they don't consume more Colo wines, using an aided list, 32% indicate they cannot find Colo wine where they purchase or consume wines in 2019. This is significantly higher in 2019 (32%) vs. 2018 (24%).
- 20% agree that Colo wines do not have the same imagery / prestige as other types and 20% say they are too expensive.

Why you don't consume or purchase more of Colorado wines (aided list)	2019 TOTAL SAMPLE (n=505)	2018 TOTAL SAMPLE (n=500)
I cannot find Colorado wines where I purchase or consume wine	32%	24%
Colorado wines don't have the prestige or same imagery as other types of wine I usually like to buy	20%	16%
Colorado wines are too expensive	20%	17%
I hear, or believe that Colorado wines don't taste good	13%	11%
I hear, or believe that Colorado does not grow good grapes for wine production	13%	10%
I hear, or believe that Colorado wines taste too fruity	6%	9%
I hear, or believe that Colorado wines are too sweet	9%	8%
The labels are not attractive on Colorado wines.	2%	3%

- Findability of Colorado wines has significantly declined in 2019 vs. 2018. 29% state they cannot "easily find Colo wines" in 2019 vs. 24% in 2018 (90% confidence level).

NOTE: significant differences vs. previous year - noted in **bold red** font at the 95% confidence level and **red** font at the 90% level..

I can easily find Colorado wine at my local wine shop or liquor store	Top 2 Box %	Bottom 2 Box %
2019 Total Sample (n=505)	40%	29%
2018 Total Sample (n=500)	42%	24%
2017 Total Sample (n=500)	33%	32%

Q. 20 In addition to what you wrote, are any of the reasons below why you don't consume or purchase more of Colorado wines?

Q. 21 What are your opinions and impressions of **Colorado wines**? Check below how much you agree or disagree with each statement.

OPINIONS OF COLORADO WINES

- A larger number of respondents agree (75% Top 2 Box) that the Colo wine industry has potential and Restaurants with locally grown food should also feature Colo wines.
- More wine drinkers agree (72% Top 2 Box) they'd like to visit Colo wineries and experiment and taste wines from different regions.
- Scores 2019 vs. 2018 are statistically at parity. However, multiple 2018 scores are significantly less vs. 2017, noted in red below.

Total Sample	2019	2018	2017
% Top 2 Box – 5 pt. scale (Strongly, Somewhat Agree)	(n=505)	(n=500)	(n=500)
I believe there are quality wines made in Colorado	66%	65%	73%
I can easily find Colorado wine at my local wine shop or liquor store	40%	42%	48%
I like to buy Colorado and support local growers	66%	67%	77%
I like to buy wine with the Colorado Proud logo on the label	40%	43%	na
I think Colorado wines are too sweet	16%	16%	na
I think of wines made in Colorado in the same way I do locally grown produce	52%	54%	60%
Craftsmanship is apparent in Colorado wines	40%	43%	49%
I am interested in visiting Colorado wineries	72%	71%	75%
I am interested in Colorado wine tasting events	69%	66%	73%
I see and hear more and more about Colorado wines than I used to	41%	40%	44%
I think the Colorado wine industry has potential for future growth	75%	75%	83%
Restaurants that feature locally grown food should also feature local wines	75%	73%	82%
Grapes in Colorado are exposed to cooler nights and hotter days which leads to better wines	34%	39%	43%
I like to experiment and taste different styles of wine and wines from different regions	72%	70%	81%
I can easily order Colorado wine online. NEW IN 2018	27%	27%	na

NOTE: significant differences vs. previous year - noted in **bold red** font at the 95% confidence level and **red** font at the 90% level..

Q. 21 What are your opinions and impressions of **Colorado wines?**

WINERIES

- Among the total sample, 33% visit wineries many times and 16% visit Colorado wineries many times.
- Conversely, 25% have never visited a winery and 46% have never visited a Colorado winery.

Winery Visits outside Colorado	2019	2018
Yes, many times	33%	28%
Yes, but only a few times	41%	44%
No, I have never visited a winery outside Colorado	25%	28%

Winery Visits in Colorado	2019	2018
Yes, many times	16%	12%
Yes, but only a few times	38%	40%
No, I have never visited a winery in Colorado	46%	49%

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 90% confidence level.

Q. 22 Have you ever visited a winery or tasting room outside Colorado?

Q. 23. Have you ever visited a Colorado winery or tasting room?

ADVICE – OPEN END:

- As in past years, a large percent of wine drinkers in 2019 indicate advertising / awareness (35%) and tasting events (13%) would help people buy and drink more Colorado wine.
- Distribution at more retailers was mentioned by 13% and lower pricing by 14%.

What advice do you have for CO wine producers to get people like you to buy and drink more CO wine?

Open-end – 2019 (n=466)	%
Create awareness/better advertising	35%
Lower price	14%
Organize more tasting events/more opportunities to taste	13%
More availability at retailers/restaurants	13%
Organize more events/festivals to create awareness	5%
Improve the quality	4%
Make better wine/keep improving your wine	3%
Label clearly about the origin/manufacturer of the wine	3%
All positive mentions	3%
Reduce the sweetness	3%
Miscellaneous	3%
Offer choice/need more variety	3%
Make it taste better	3%
Better offers/deals	3%
Free samples to taste	2%
Collaborate with restaurants to advertise more	2%
Other manufacturing/production process mentions	2%
Prefer red wine	2%
Other product variety mentions	2%
Advertise more through social media	2%
Be innovative/make unique wines	2%
Other improve the taste mentions	1%
Other creating awareness mentions	1%
Provide information about the wines	1%
More food pairing events	1%
Make more wine	1%
Prefer dry wine	1%
Offer coupons	1%
Prefer organic wines	1%
Focus on traditional style/prefer standard wine	1%
Other price mentions	1%
Other samples/tasting events mentions	1%
Need customer reviews	1%
Make the bottle appealing	1%
Provide smaller size bottles	1%
Other package mentions	1%
Produce award winning wines	1%

Q. 24 What advice do you have for Colorado wine producers to get people like you to buy and drink more Colorado wine?

A CLOSER LOOK AT...

Metro Denver wine drinkers

SCORESHEET – OVERVIEW OF DENVER METRO DRINKERS

Denver Metro wine drinkers mirror the total sample. There are some minor differences noted by 2019 index to total sample:

- Slightly younger – index 106.
- 76% have heard of Colorado wines and 65% have consumed Colorado wines.
- When comparing 2019 to 2018, significantly more:
 - Allocate 20% share to Colo wines.
 - Believe Colo wine is improving in quality.
 - Experiment with different styles.
 - Are interested in visiting Colo wineries.
- Slight increase in “can easily find Colo wines” – 39%; trending in the right direction, however, not significantly different 2019 vs. 2018 and one of the lowest scoring statements.

	2019 (n=505)	2018 (n=275)	2017 (n=264)	2019 Index to total sample
Denver Metro wine drinkers				
Slightly younger: Age 21-35	33%	34%	37%	106
Heard of Colo wines - awareness	76%	77%	78%	101
Consumed Colo wines	65%	64%	62%	102
Purchase Colo wines monthly, weekly	11%	16%	17%	92
20%+ share of wine purchases allocated to Colo. Wines	32%	27%	37%	94
Future PI in Colo wine (%T2 Box)	62%	62%	65%	98
Believe Colo wine is quality (%T2 Box)	39%	43%	49%	103
Believe Colo wine improving in quality (%T2 Box)	57%	49%	58%	104
Believe Colo wine priced fairly	68%	71%	77%	101
Never purchased Colo. Wine	20%	23%	27%	100
I like to buy and support local growers	64%	64%	76%	97
Restaurants that feature locally grown food should also feature local	73%	71%	75%	97
I like to experiment and taste different styles of wines from different regions	73%	67%	78%	101
I think the Colo wine industry has potential for future growth	75%	73%	76%	100
I am interested in visiting Co. wineries	72%	66%	75%	100
I believe there are quality wines made in Colorado	62%	61%	66%	94
I can easily find Colorado wines at my local wine shop or liquor store	39%	37%	27%	98
I hear more and more about Colo wines than I used to	41%	38%	47%	100

Bold red font = significantly different vs. previous year at the 95% confidence level; non bold = 90% confidence level.

DEMOGRAPHICS OF METRO DENVER WINE DRINKERS

Age, Education & Gender

- Age and Gender of Metro Denver vs. Non-Metro Denver respondents is very similar.
- There are significantly more Denver Metro wine drinkers that graduated a 4 year college (45%).
- Most (79%) of Denver Metro wine drinkers have lived in Colorado for 8+ years; 74% of non-Metro Denver.

Age	21-35	36-50	51-70
2019 Denver Metro (n=285)	33%	25%	42%
2019 Non Denver Metro (n=220)	29%	29%	42%

Gender	Male	Female
2019 Denver Metro (n=285)	46%	54%
2019 Non Denver Metro (n=220)	38%	62%

Lived in Colorado - 2019	N=505
Less than a year	4%
1-3 years	10%
4-7 years	10%
8+ years	76%

Education	Graduated high school	Some College	Graduated 2 year college	Graduated 4 year college	Post graduate degree
2019 Denver Metro (n=285)	6%	14%	7%	45%	28%
2019 Non Denver Metro (n=220)	7%	19%	10%	36%	27%

Bold red font = significantly different vs. previous year at the 90% confidence level

Q. S1 What is your gender?

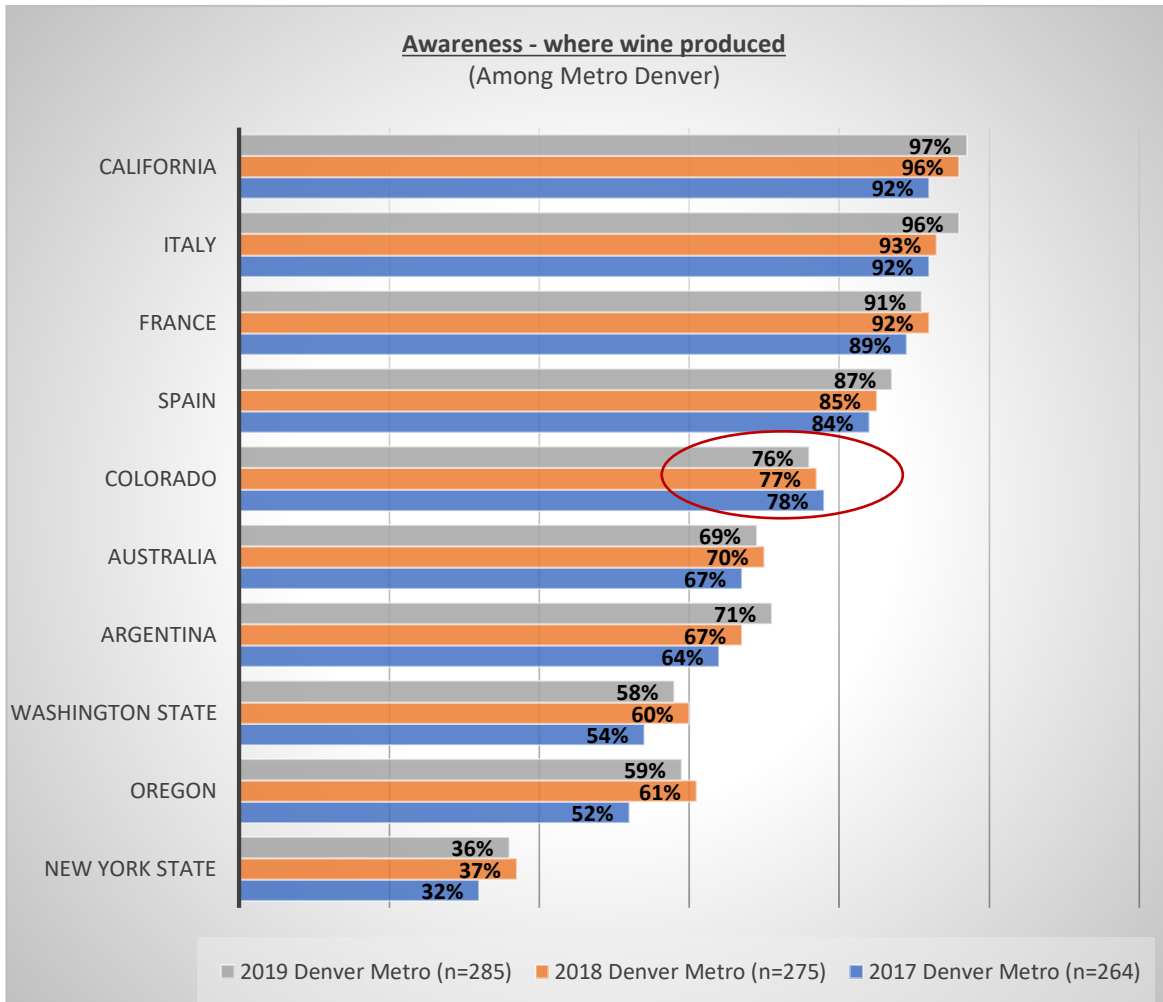
Q. S3a How long have you lived in Colorado.

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.

METRO DENVER — COLO WINE AWARENESS

- Advertising and local efforts in the Denver Metro geography has generated awareness for Colo wines among 76%. Over time, Colorado wine awareness in Metro Denver shows no significant differences.
- Versus the total, Metro Denver awareness of Colorado wines indexes at 102.



Heard of wine being produced (aided)	Denver Metro 2019 index to total
California	101
Italy	100
France	100
Spain	102
Colorado	102
Australia	103
Argentina	102
Washington State	104
Oregon	104
New York State	98

Q. 2 From which of the following geographic areas have you ever heard of wine being produced? (check all that apply)

METRO DENVER - COLO WINE CONSUMPTION

- 68% of Denver Metro and 65% of Non Metro Denver consumers drink wine weekly and more often.
- 65% of Metro Denver wine drinkers have consumed Colorado wine; indexing at 101; slightly above the total.
- More Metro Denver wine drinkers consume wine from all geographies vs. Non Metro Denver.

How often do you drink wine?	2019 Denver Metro (n=285)	2018 Denver Metro (n=275)	2017 Denver Metro (n=264)	2019 Non Metro Denver (n=220)	2018 Non Metro Denver (n=225)	2017 Non Metro Denver (n=236)
Weekly +	68%	72%	66%	65%	68%	72%

Areas where you have ever consumed wine	2019 Denver Metro (n=285)	2018 Denver Metro (n=275)	2017 Denver Metro (n=264)	2019 index to total	2019 Non Denver Metro (n=220)	2018 Non Denver Metro (n=225)	2017 Non Denver Metro (n=236)
California	93%	92%	87%	102	89%	90%	89%
Italy	76%	77%	75%	103	72%	69%	69%
France	69%	72%	67%	105	62%	67%	67%
Colorado	65%	64%	62%	101	63%	69%	64%
Spain	53%	58%	58%	106	46%	55%	50%
Australia	55%	57%	52%	106	48%	51%	45%
Argentina	50%	47%	43%	106	43%	45%	37%
Washington State	40%	41%	37%	111	31%	32%	28%
Oregon	41%	41%	33%	115	29%	34%	27%
New York State	19%	19%	15%	108	15%	15%	18%

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

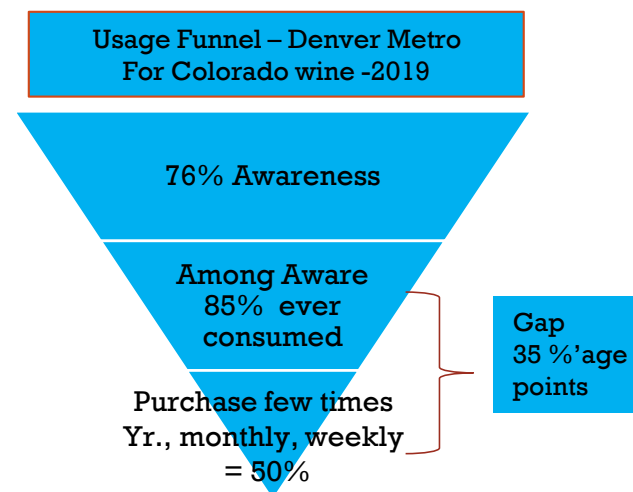
Q. 3 From which of the following geographic areas have you consumed wine? Check all that apply.

METRO DENVER USAGE FUNNEL

Similar to the total sample, in Denver, where ad money is spent, there is a large gap among those who regularly purchase Colo wine and those who have tried it.

- In Metro Denver, 76% have heard of Colo. Wines. And of those aware of Colorado wines, 85% have tried Colo wines.
- However, only 50% purchase Colo wines on a regular basis (weekly, monthly and a few times a year). This is a gap of 35 percentage points.
- Among Colo wine drinkers in Denver, 64% hear of Colo wines at liquor/wine stores; on par with the total 65%. Winery/wine tasting rooms are also popular places to hear about Colo wines among Metro Denver wine drinkers (57% in 2019).

Where hear of Colo wines Among Colo wine drinkers - 2019	Total N=323	Den Metro (n=184)
Magazines	13%	14%
At a liquor store or wine store	65%	64%
Word of mouth - from friends, family, etc.	49%	50%
Social Media	15%	11%
At a restaurant	37%	37%
At a winery or wine tasting room	55%	57%
Billboards / advertising	10%	11%
Events, wine tasting	45%	44%



METRO DENVER – HARD TO FIND COLO WINES

- Of all the reasons listed as to why they don't consume/purchase more Colo wine, the inability to find Colo wines is checked by the most people in Denver Metro (31%); in Non –Denver it's among 35%.
- 19% of Denver Metro drinkers believe Colo wines are too expensive; statistically on par with Non Denver Metro (22%).
- 21% say Colo wines lack prestige.

Why you don't consume or purchase more of Colorado wines	2019 TOTAL SAMPLE (n=505)	2019 Denver Metro (n=285)	2019 Non Denver Metro (n=220)
Colorado wines are too expensive	20%	19%	22%
I cannot find Colorado wines where I purchase or consume wine	32%	31%	35%
I hear, or believe that Colorado wines are too sweet	9%	9%	8%
I hear, or believe that Colorado wines don't taste good	13%	17%	9%
I hear, or believe that Colorado does not grow good grapes for wine production	13%	12%	14%
I hear, or believe that Colorado wines taste too fruity	6%	5%	8%
Colorado wines don't have the prestige or same imagery as other types of wine I usually like to buy	20%	21%	20%
The labels are not attractive on Colorado wines	2%	1%	3%

- 39% Agree (T2 Box) in Denver Metro that they “Can easily find Colo wine at my local wine shop or liquor store,” however, 29% (bottom 2 Box) say they disagree with this statement. This measure has stayed statistically the same in 2019 vs. 2018.

I can easily find Colorado wine at my local wine shop or liquor store	2019 Denver Metro (n=285)	2018 Denver Metro (n=275)	2017 Denver Metro (n=264)
T2 Box % - Agree	39%	37%	27%
B2 Box % - Disagree	29%	25%	34%

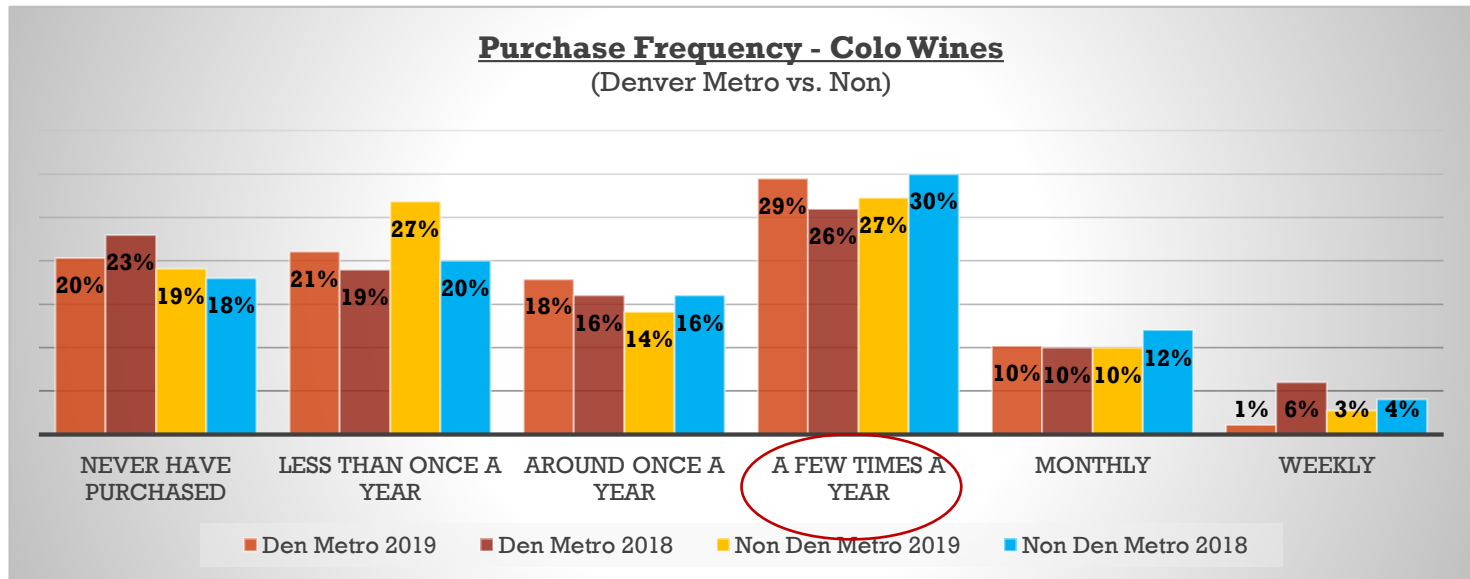
Q.20 In addition to what you wrote, are any of the reasons below why you don't consume or purchase more of Colorado wines?

Q. 21 What are your opinions and impressions of **Colorado wines**? Check below how much you agree or disagree with each statement.

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

COLO WINE PURCHASE FREQUENCY - DENVER METRO

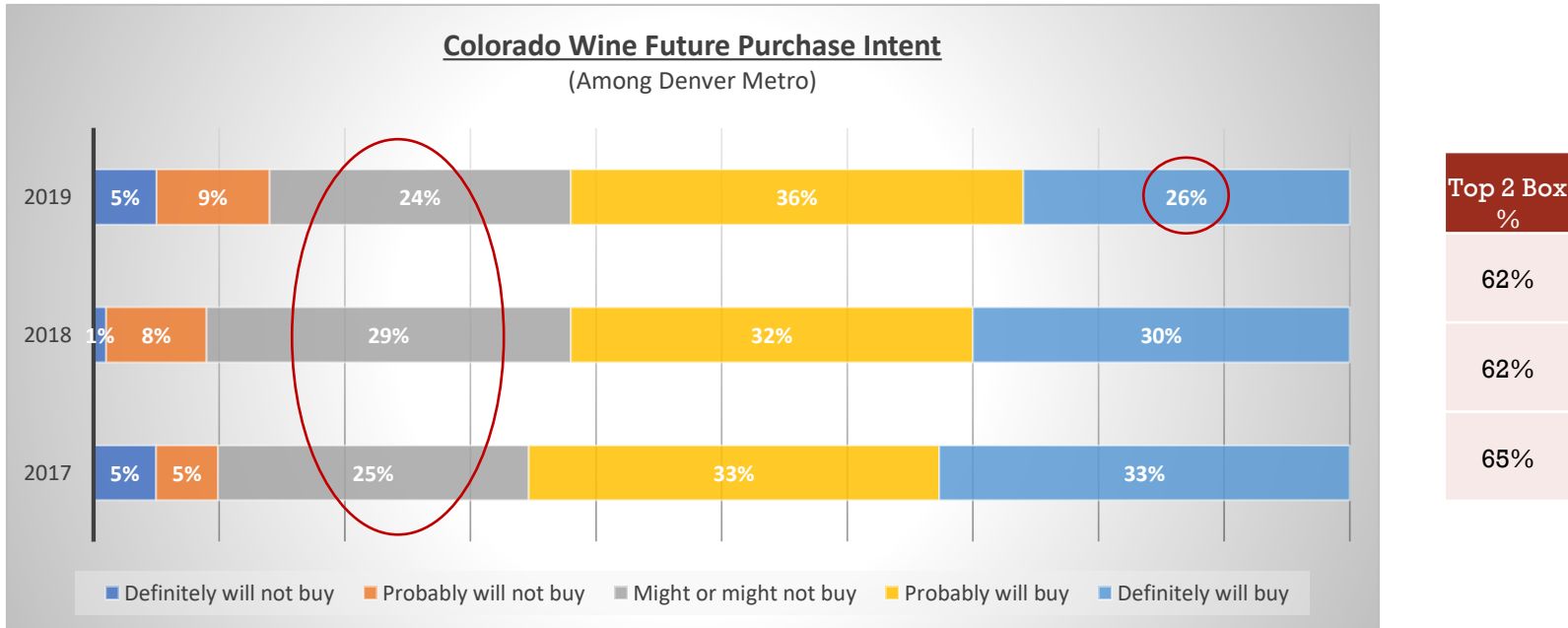
- Colorado wine purchase is infrequent in both Denver and non-Denver – a few times a year or less.
- 20% in Denver have never purchased Colorado wine in 2019; 19% in Non-Denver.
- The number of Monthly and Weekly purchasers are relatively the same over time for both geographies.



Q. 9 How often do you typically purchase wine from each of the following geographic areas?

FUTURE PURCHASE OF COLO WINE

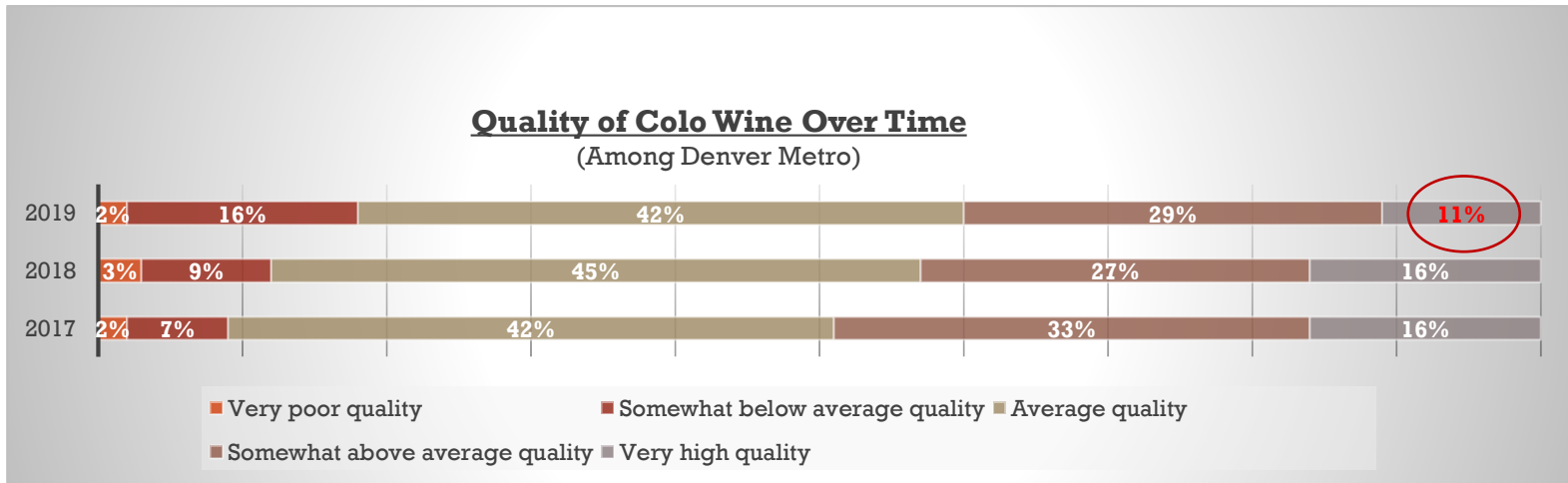
- Top 2 Box Purchase interest is average for Denver Metro over time– scores in the 60%'s.
- 26% say they will definitely buy Colo wines.
- 24% of drinkers in Denver are “on the fence” – may or may not buy.



Q. 10 In the future, how interested are you in purchasing wine from each of the following geographic areas? Colorado

IMPRESSIONS OF QUALITY – DENVER METRO

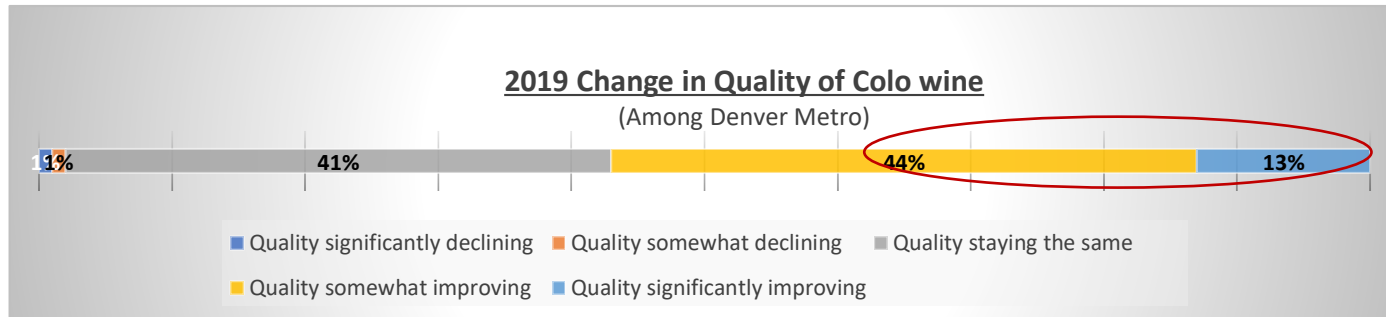
- Impressions of Colorado wine as “very high quality” among Denver Metro fell significantly to 11% in 2019 from 16% in 2018.
- Top 2 Box (Very high and somewhat above average quality) is trending down, 40% in 2019 is significantly lower than 49% in 2017.



Top 2 Box %	
2019	40%
2018	43%
2017	49%

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

- Among Denver Metro, 57% (T2 Box) believe quality is improving.

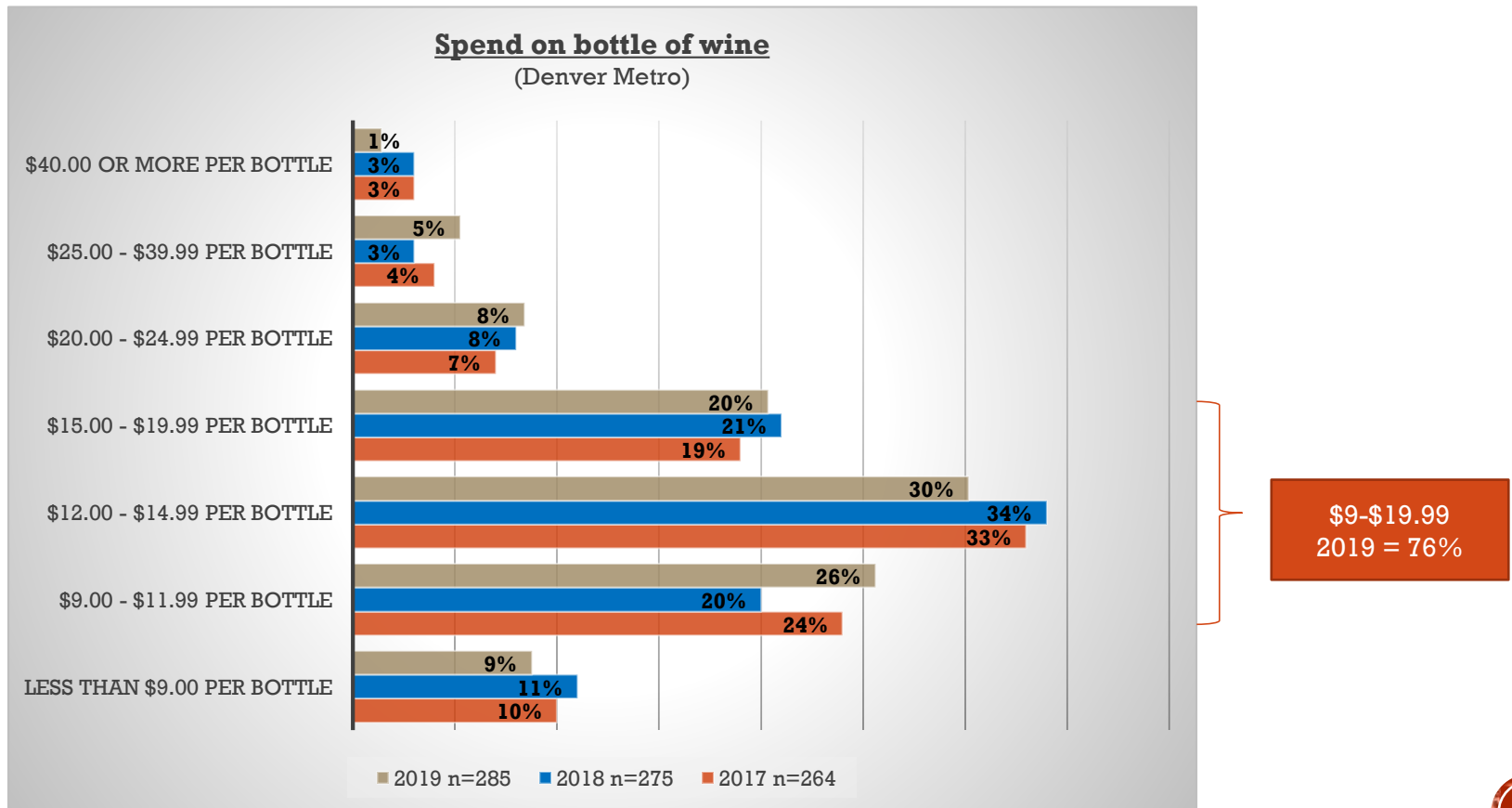


Q. 11 Select the statement that best describes your opinion and impression regarding the quality of wines from each of the following geographic areas. Check one in each row.

Q. 12 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)

PRICE PAID FOR WINE – DENVER METRO

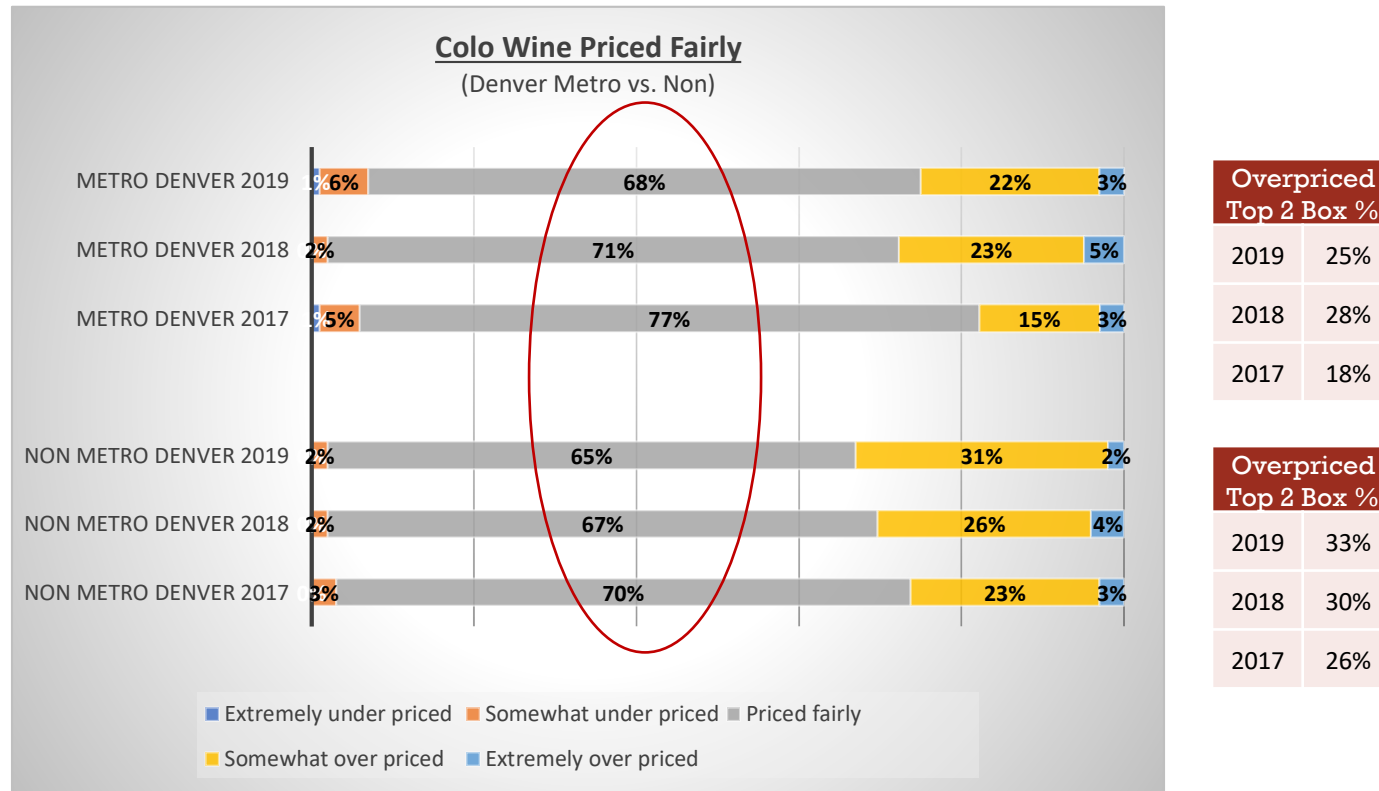
- The price sweet spot among 76% of Denver Metro in 2019 for all wine is \$9 - \$19.99 per bottle. This is on par with Non Denver – 70% pay this amount.
- Prices \$20 and above lose a large percent of wine drinkers' interest.



Q. 5 How much do you typically spend on a bottle of wine?

COLO WINES PRICE IMPRESSIONS - DENVER METRO

- The majority (68% in Denver) believe Colorado wine is priced fairly; 65% in non-Denver.
- 25% of wine drinkers believe Colo wines are over priced in Denver; 33% in Non-Denver areas.



13. 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.

WHERE EXPECT TO BUY COLORADO WINES

- Neighborhood liquor stores and Wineries/wine tasting rooms continue to be where most Denver wine drinkers expect to buy Colo wines (62%).
- 43% Denver wine drinkers expect to buy Colo wines in Grocery stores / Membership warehouses – significantly up in 2019 from 34% in 2018.
- Non Denver wine drinkers follow the same pattern as Denver wine drinkers with most expecting to buy Colo wine at neighborhood liquor stores (75% in 2019).
- Among Non-Metro Denver wine drinkers, both Farmer’s markets (26%) and Wine specialty shops (45%) have significantly fewer respondents believing they could buy Colo wine at these retailers.

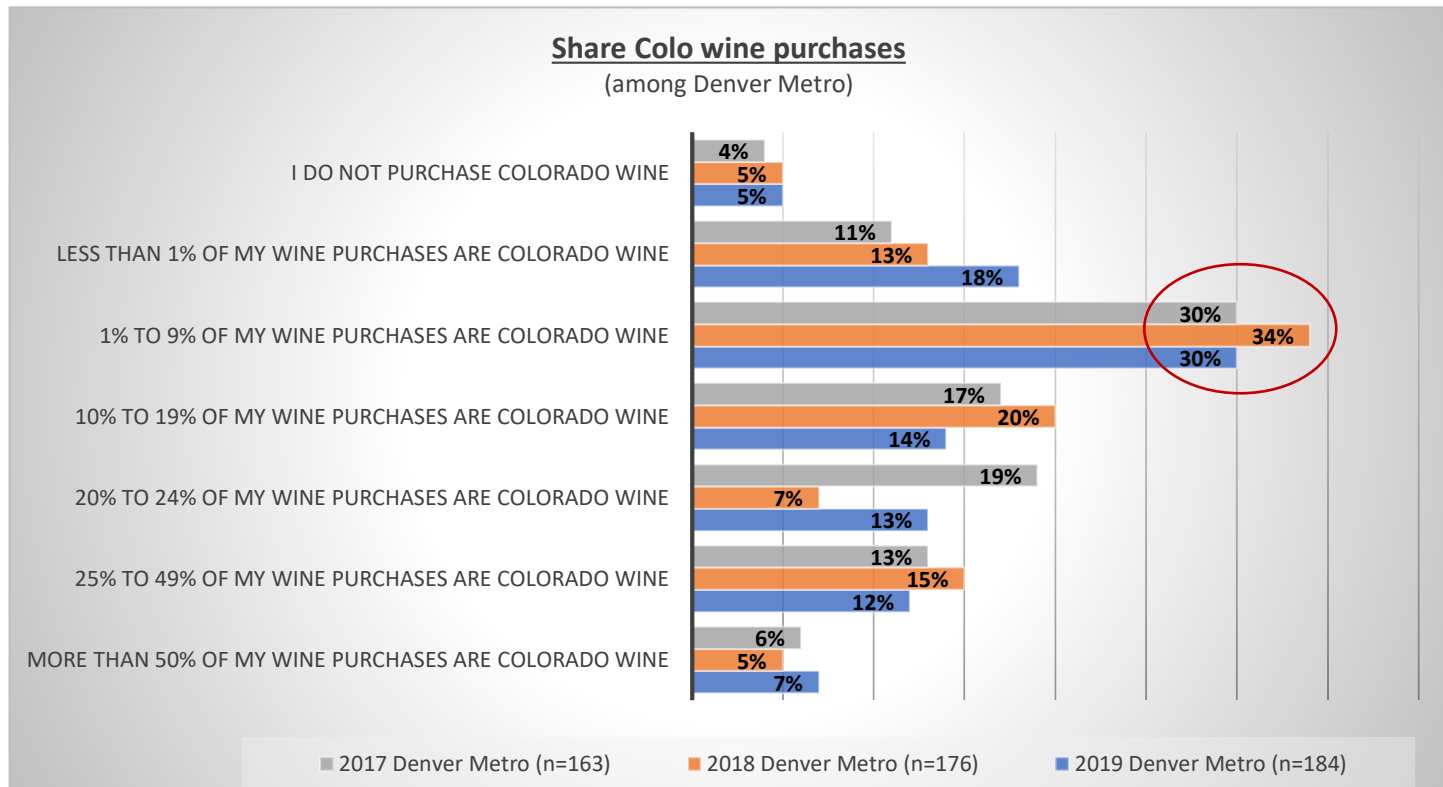
Where would you expect to buy Colorado wines?	2019 Denver Metro (n=285)	2018 Denver Metro (n=275)	2017 Denver Metro (n=264)	2019 Non Denver Metro (n=220)	2018 Non Denver Metro (n=225)	2017 Non Denver Metro (n=236)
Neighborhood liquor store	62%	66%	71%	75%	75%	69%
Wine specialty shop	51%	52%	58%	45%	55%	59%
Winery or wine tasting room	62%	55%	57%	57%	60%	61%
Restaurants	48%	43%	50%	46%	47%	47%
Large, volume discount liquor store	50%	47%	50%	45%	47%	42%
Farmer's markets	38%	35%	39%	26%	37%	37%
Grocery stores or Membership warehouses that sell wine*	43%	34%	34%	32%	28%	32%
Bars	34%	29%	33%	30%	30%	30%
Internet	20%	19%	20%	19%	19%	18%
Wine club (new in 2018)	24%	23%	na	19%	24%	na

Q 17 Where would you expect to buy **Colorado wines?**

*Grocery store/ membership warehouse combined in 2019

COLORADO WINES SHARE OF PURCHASE

- The largest number of drinkers in Denver (30%) say they allocate 1-9% share of purchases to Colorado wines; this is consistently the largest group over time.
- Share allocation (2nd chart below) of 20%+ and 25%+ to Colorado wines remains statistically at parity 2019 vs. 2018.



% Share Allocated to Colorado wines	2019 Denver Metro (n=184)	2018 Denver Metro (n=176)	2017 Denver Metro (n=163)	2019 Non Denver Metro (n=139)	2018 Non Denver Metro (n=156)	2017 Non Denver Metro (n=150)
		A	B		C	D
25%+	19%	20%	19%	25%	24%	29%B
20%+	32%	27%	37%A	37%	33%	42%

Q 18 What percentage of your overall wine purchases would you estimate is Colorado wine? (Among Colo wine drinkers in Metro Denver)

NOTE: significant differences by column A, B, C, D - noted in **Bold red** font at the 95% confidence level.

METRO DENVER SEEING/HEARING MORE

- 41% of wine drinkers in Metro Denver agree they are “Seeing and hearing” more about Colorado wines than they used to in 2019. In 2017, this was higher at 47%, though not significantly so. Non-Denver drinkers are statistically at parity over time on this measure.
- Denver Metro Colorado winery visits are at parity to the total sample – 38% saying they visit a few times.
- 77% of Denver wine drinkers have consumed wine in a box – same as total (77%).

I see and hear more and more about Colorado wines than I used to	2019 Denver Metro	2018 Denver Metro	2017 Denver Metro	2019 Non Denver Metro	2018 Non Denver Metro	2017 Non Denver Metro
Top 2 Box % - Agree	41%	38%	47%	40%	43%	44%
Bottom 2 Box % - Disagree	26%	23%	24%	28%	22%	27%

Winery Visits in Colorado	TOTAL 2019	Denver Metro 2019
Yes, many times	16%	17%
Yes, but only a few times	38%	36%
No, I have never visited a winery in Colorado	46%	46%

Package Consume Wine	TOTAL 2019	Denver Metro 2019
On tap wine /from a keg	27%	31%
Boxed wine	77%	77%
Wine in a can	33%	35%
None of the above	16%	15%

Q. 21 What are your opinions and impressions of **Colorado wines**? Check below how much you agree or disagree with each statement.

Q. 23. Have you ever visited a Colorado winery or tasting room?

Q 14_new: From which of the following package types have you ever consumed wine?

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

A CLOSER LOOK AT...

Wine Drinkers of Colorado-produced wines

SCORESHEET – OVERVIEW OF COLORADO WINE DRINKERS

Vs. the total sample of wine drinkers, Colorado wine drinkers index higher on most key measures in 2019:

- Older, slightly more college graduates.
- They consume and buy wine more frequently.
- They are more interested in Colorado wine purchase in future.
- They believe Colorado wines are good quality and improving in quality.
- More agree (Top 2 Box) with Colo wine statements, indexing above the total (100+).

Colorado-produced wine drinkers	2019 (n=323)	2018 (n=332)	2017 (n=313)	2019 Index to total sample
Older: Age 51-70	48%	43%	42%	114
More college grad & post grad	75%	67%	68%	110
More male vs. total	46%	48%	38%	109
Consume more wine – weekly +	69%	76%	74%	104
Buy CO wine more frequent – monthly & weekly q9	14%	19%	26%	116
Future PI in Colo wine higher - T2 Box %	68%	71%	77%	108
Believe Colo wine is quality- T2 Box %	48%	51%	62%	123
Believe Colo wine improving in quality- T2 Box %	61%	57%	67%	111
Believe Colo wine priced fairly - T2 Box %	67%	68%	73%	100
I like to buy and support local growers- T2 Box %	72%	71%	82%	109
Restaurants that feature locally grown food should also feature local- T2 Box %	79%	75%	80%	106
I like to experiment and taste different styles of wines from different regions- T2 Box %	76%	74%	84%	106
I think the Colo wine industry has potential for future growth- T2 Box %	80%	83%	87%	107
I am interested in visiting Co. wineries - T2 Box %	79%	76%	82%	110
I believe there are quality wines made in Colorado – T2 Box %	74%	75%	82%	112
I can easily find Colorado wines at my local wine shop or liquor store- T2 Box %	49%	49%	41%	123
I hear more and more about Colo wines than I used to - - T2 Box %	48%	48%	55%	117

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level. Non-bold red font = significant difference vs. previous year at the 90% confidence level.

DEMOGRAPHICS OF COLORADO WINE DRINKERS

Age, Education & Gender

- Many of the data for Colorado wine drinkers reflect the total sample since they make up 64% of the total.
- Colorado wine drinkers skew slightly older and more educated, with 82% graduating 2 year, 4 year and post graduate college.

	2019 CO Wine Drinkers (n=323)	2018 CO Wine Drinkers (n=332)	2017 CO Wine Drinkers (n=313)
AGE			
21-35	25%	28%	33%
36-50	27%	29%	25%
51-70	48%	43%	42%

	2019 CO Wine Drinkers (n=323)	2018 CO Wine Drinkers (n=332)	2017 CO Wine Drinkers (n=313)
Gender			
Female	54%	52%	38%
Male	46%	48%	62%

	2019 CO Wine Drinkers (n=323)	2018 CO Wine Drinkers (n=332)	2017 CO Wine Drinkers (n=313)
Education			
Some /Graduated high school	5%	7%	7%
Some college	13%	17%	16%
Graduated 2 year college	7%	9%	9%
Graduated 4 year college	46%	38%	43%
Post Graduate degree-masters or doctorate	29%	29%	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.

COLORADO WINE DRINKERS - CONSUMPTION

- The largest percent of Colorado wine drinkers (41%) drink wine more than once a week, but not every day. 69% of them are Weekly + wine drinkers; down significantly from 2018 (76%).
- Colorado wine drinkers are experimental, with large percentages consuming wines from different regions – consumption penetration is consistent over time.

How often drink wine	2019 CO Wine Drinkers (n=323)	2018 CO Wine Drinkers (n=332)	2017 CO Wine Drinkers (n=313)
WEEKLY + NET	69%	76%	74%
Daily	9%	9%	12%
More than once a week but not every day	41%	45%	40%
Once a week	19%	21%	22%
2-3 times/ mo.	20%	13%	18%
Once a month	8%	8%	7%
Special occasions/holidays	3%	3%	2%

Areas where you have ever consumed wine	2019 CO Wine Drinkers (n=323)	2018 CO Wine Drinkers (n=332)	2017 CO Wine Drinkers (n=313)
California	93%	92%	92%
Colorado	100%	100%	100%
Italy	79%	76%	78%
France	72%	73%	73%
Spain	57%	61%	65%
Australia	59%	60%	57%
Argentina	54%	49%	48%
Oregon	45%	44%	38%
Washington State	44%	43%	40%
NY State	23%	20%	20%

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level. Non-bold red font = significant difference vs. previous year at the 90% confidence level.

Q.56 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

- 38% of drinkers of Colorado wine drinkers, purchase Colorado wine a few times a year.
- Over time, percentages of drinkers and frequency of purchase has remained statistically on par.

	2019	2018	2017
CO wine drinkers purchase of Colorado Wines	(n=323)	(n=332)	(n=313)
Weekly	2%	5%	7%
Monthly	11%	14%	19%
A few times a year	38%	37%	34%
Around once a year	19%	19%	18%
Less than once a year	26%	21%	16%
Have never purchased (did consume per q. 3)	3%	4%	5%

FUTURE PURCHASE OF COLO WINE

- 68% of Colorado wine drinkers are interested in purchasing Colorado wine in the future slightly higher vs. the total sample (63%), but not significantly so.
- Drinkers of Colorado wine state significantly higher Purchase Intent for California wines (86%) in 2019 vs. PI for Colo. Wines 68%.

Future Purchase Intent – Top 2 Box (5 pt. scale)	2019	2018	2017
Total Sample – Colorado Wine	63%	64%	68%
Among Colo. Wine drinkers – Colorado Wine Future PI	68%	71%	77%
Total Sample – California Wine	85%	86%	86%
Among Colo. Wine drinkers – California Wine Future PI	86%	87%	88%

Q. 10. In the future, how interested are you in purchasing wine from each of the following geographic areas?

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

COLORADO WINE DRINKERS' SHARE

- Colorado wine as a percent of total wine bought, significantly decreased among Colo wine drinkers in 2018: 30% indicate Colorado wine is 20% or more of total share of wine purchase vs. 39% in 2017.
- As in past years, many (29% in 2019) allocate 1-9% share of wine purchases to Colo wines.

Percent of total Wine purchases – among CO. wine drinkers	2019 (n=323)	2018 (n=332)	2017 (n=313)
More than 50% of my wine purchases are Colorado wine	9%	6%	9%
25% to 49% of my wine purchases are Colorado wine	12%	16%	15%
20% to 24% of my wine purchases are Colorado wine	12%	8%	16%
10% to 19% of my wine purchases are Colorado wine	13%	19%	17%
1% to 9% of my wine purchases are Colorado wine	29%	30%	27%
Less than 1% of my wine purchases are Colorado wine	20%	16%	13%
I do not purchase Colorado wine	5%	5%	4%

Share	2019	2018	2017
25%+	21%	22%	23%
20%+	34%*	30%	39%*

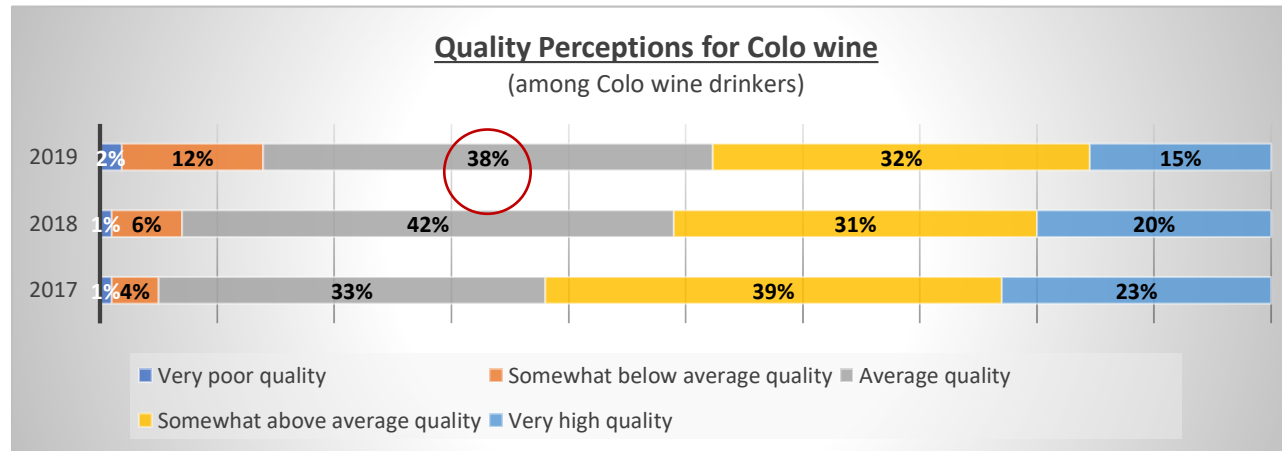
Q 17 What percentage of your overall wine purchases would you estimate is Colorado wine? Think about the percentage of your purchases in terms of volume. (Among those indicating they've consumed Colorado wine – Q. 3); question not asked in 2015 survey.

*Rounding variance – not additive at whole decimals.

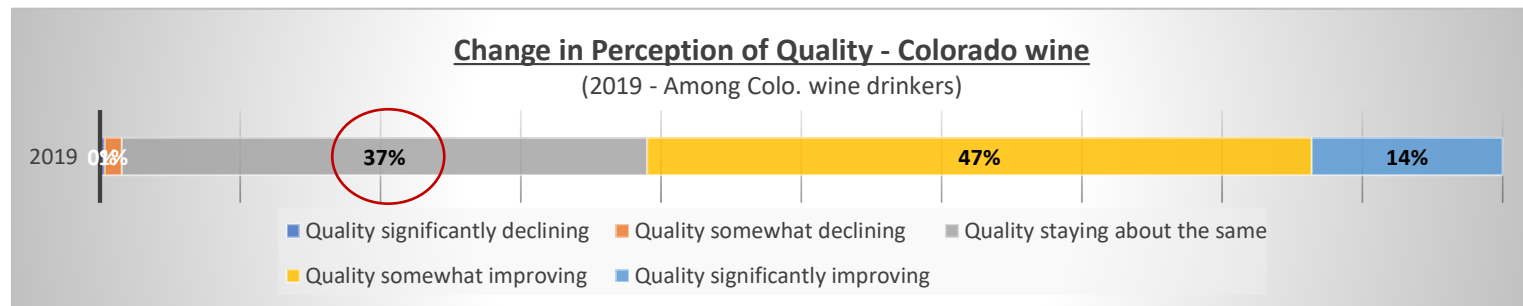
NOTE: significantly higher differences vs. previous year, noted in **Bold red** font at the 95% confidence level.

IMPRESSIONS OF QUALITY AMONG DRINKERS OF COLO WINE

- 48% T2 Box of drinkers of Colo wine drinkers associate positive quality with Colo wines. A very large 38% believe quality is average.
- By comparison, 81% T2 Box of Colo wine drinkers rate Cali wine quality as positive.
- In 2019, 37% of Colorado wine drinkers believe Colo wine quality is staying the same; 61% (T 2 Box) believe it's improving.



Top 2 box %
48%
51%
62%



Top 2 box %
61%

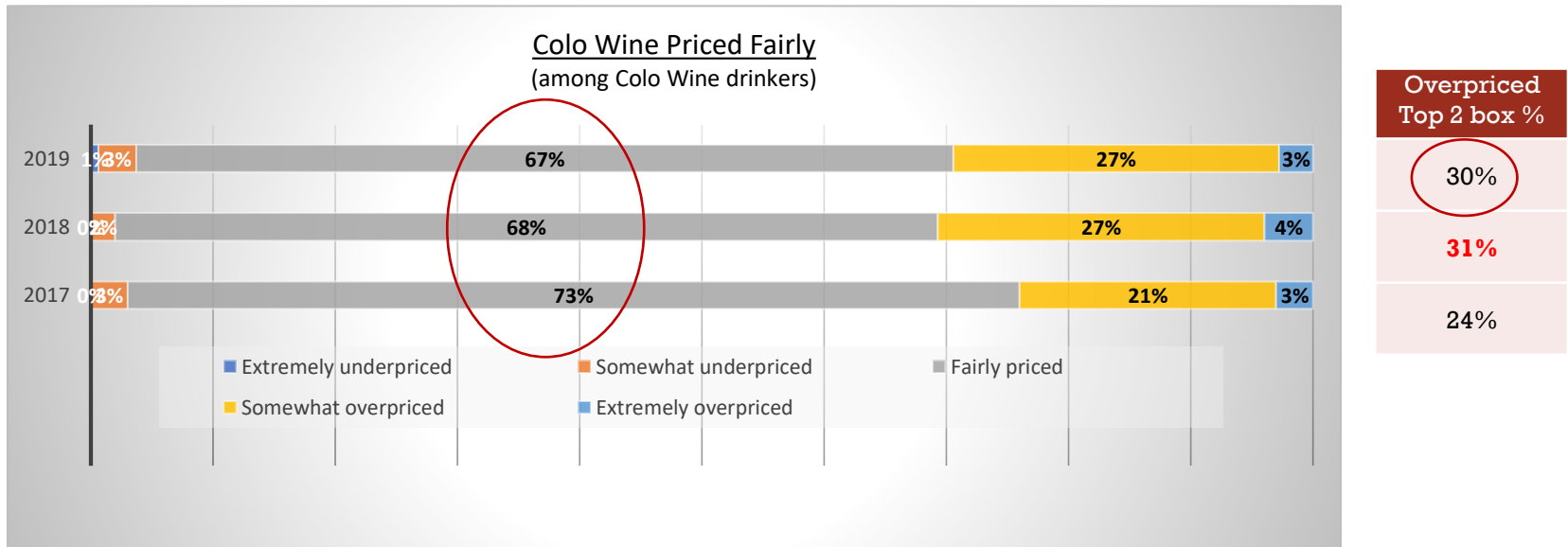
Q. 11 Select the statement that best describes your opinion and impression regarding the quality of wines from each of the following geographic areas. Check one in each row.

Q. 12 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.

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

COLO WINES IMPRESSIONS OF PRICE – COLO WINE DRINKERS

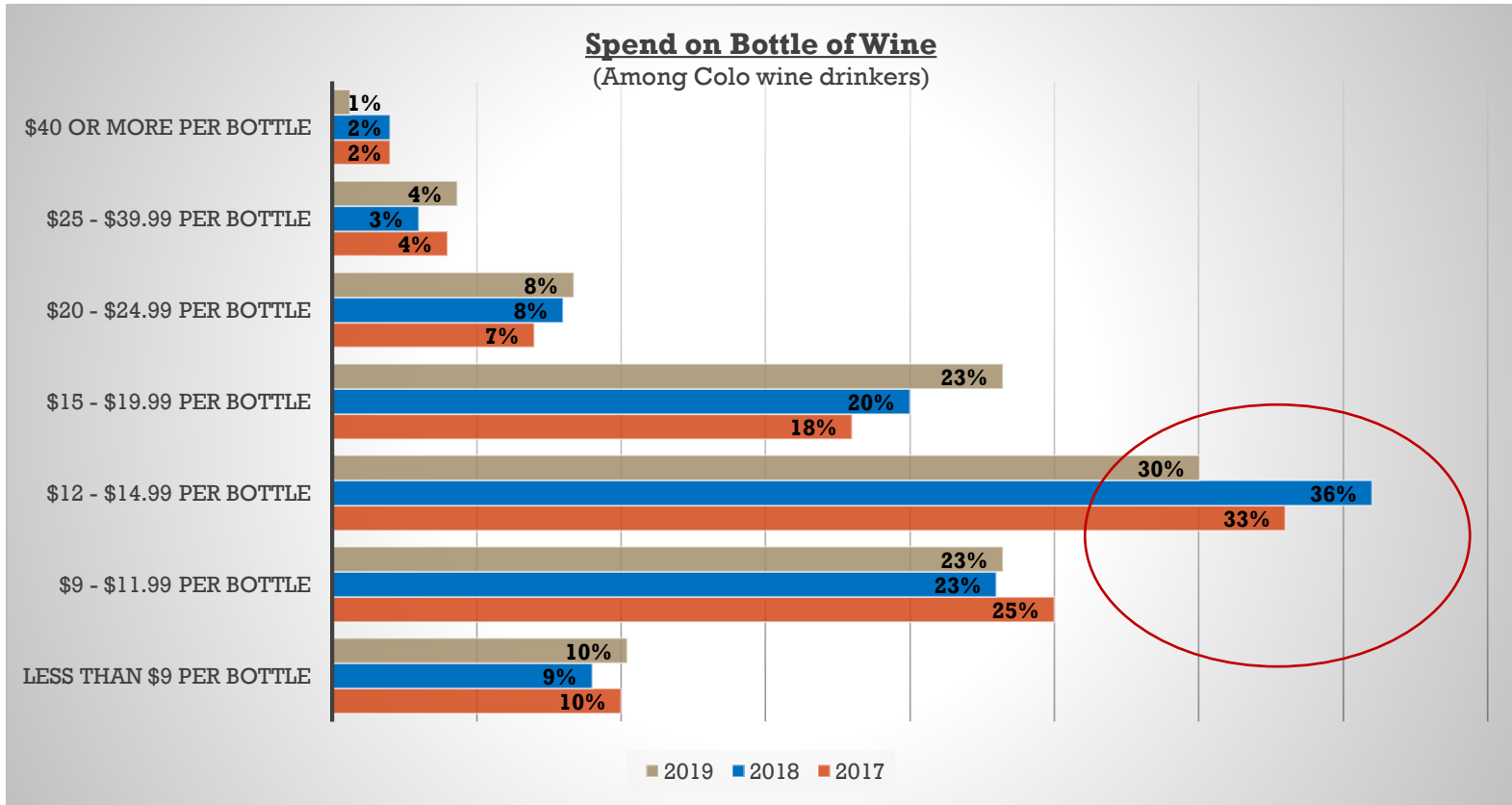
- Over time, the majority of wine drinkers believe Colorado wine is fairly priced – 67% in 2019.
- 30% T2 Box in 2019 believe Colorado wines are somewhat over priced. This is statistically higher vs. 2017 (24%).



Q. 13 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.

PRICE PAY FOR WINE — COLO WINE DRINKERS

- The bulk of respondents who drink Colorado-produced wine expect to pay \$9 - \$19.99 per bottle for wine.
- 30% in 2019 believe \$12 - \$14.99 is the sweet spot for wine pricing.
- This is similar over time; no statistical differences from year to year.



Q. 14 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

LOCATIONS FOR COLO WINE PURCHASE

- Among Colorado wine consumers, neighborhood liquor stores are where most expect to buy wine (70% agree).
- When asked what percent of any wine is purchased in what kinds of retail accounts (share – in columns to right in chart below), neighborhood liquor stores make up 30% share of wine and 27% of where buy Colo wine – which is on par.
- 67% of Consumers of Colo wine expect to purchase Colo wines in Winery / Tasting rooms but these consumers only purchase 5% of wine at winery/tasting rooms. Though among those purchasing Colo wines, 20% share come from Winery / Tasting rooms.

Among Colo wine consumers	Where expect to buy CO Wine - Q 17			Where actually buy CO Wine – Q 15			Where actually buy ANY wine – Q4		
	(% agree)			(share %)			(share %)		
	2019 (n=323)	2018 (n=332)	2017 (n=314)	2019 (n=323)	2018 (n=332)	2017 (n=314)	2019 (n=323)	2018 (n=332)	2017 (n=314)
Neighborhood liquor store	70%	73%	73%	27%	34%	31%	30%	35%	33%
Winery or wine tasting room	67%	62%	67%	20%	17%	17%	5%	4%	6%
Wine specialty shop	52%	56%	63%	4%	7%	8%	5%	4%	8%
Restaurants	49%	47%	52%	10%	10%	11%	13%	10%	12%
Large, volume discount liquor store	52%	52%	49%	18%	17%	17%	22%	25%	22%
Farmer's markets	34%	37%	42%	2%	3%	3%	1%	1%	1%
Bars	33%	30%	36%	4%	3%	4%	6%	6%	6%
Grocery store / Membership warehouse that sells wine*	38%	30%	32%	9%	4%	5%	11%	5%	5%
Internet	20%	22%	20%	0%	1%	2%	2%	3%	5%
Wine club (New in 2018)	20%	25%		1%	1%		5%	5%	

*Grocery store/ membership warehouse combined in 2019

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level; red font/ not bold = 90% confidence level.

A CLOSER LOOK AT...

Frequent wine drinkers - Weekly and more often

SCORESHEET – OVERVIEW OF FREQUENT (WEEKLY+) WINE DRINKERS

In 2019, More Frequent (weekly+) wine drinkers index higher vs. the total on:

- Slightly older (36-50), more college educated and slightly more male.
- 66% of Weekly + drinkers have consumed Colo wines (index 104); but down significantly in 2019 vs. 2018 (72%).
- 65% agree that Colorado wines are high in quality; significantly more than 2018 (47%).
- 62% believe Colo wines are priced fairly. However, they index lower vs. the total sample (93).
- 74% like to experiment tasting different wines (index 104).
- 18% have never purchased a Colo wine – lower than the total sample, index 93.
- 30% of frequent wine drinkers (weekly+) allocate 20% or more to Colorado wine purchases.
- 75% believe restaurants with locally grown food should also feature Colo wines.

Frequent (Weekly +) wine drinkers	2019 (n=336)	2018 (n=350)	2017 (n=346)	2019 Index to total sample
Slightly older: Age 36-50	73%	75%	71%	105
More college grad & post grad	70%	67%	71%	103
Slightly more male vs. total	48%	47%	38%	113
Heard of Colo wines - awareness	76%	80%	78%	102
Consumed Colo wines	66%	72%	66%	104
Purchase Colo wines monthly, weekly	14%	19%	25%	115
20%+ share of wine purchases allocated to Colo. wines	30%	28%	38%	90
Future PI in Colo wine – T2 Box %	61%	65%	69%	96
Believe Colo wine is quality– T2 Box %	65%	47%	53%	99
Believe Colo wine improving in quality– T2 Box %	57%	51%	62%	103
Believe Colo wine priced fairly – T2 Box %	62%	66%	71%	93
Never purchased Colo. Wine– T2 Box %	18%	15%	20%	93
I like to buy and support local growers – T2 Box %	64%	67%	81%	98
Restaurants that feature locally grown food should also feature local– T2 Box %	75%	74%	77%	100
I like to experiment and taste different styles of wines from different regions – T2 Box %	74%	74%	78%	103
I think the Colo wine industry has potential for future growth – T2 Box %	75%	77%	78%	100
I am interested in visiting Co. wineries – T2 Box %	74%	73%	82%	103
I believe there are quality wines made in Colorado – T2 Box %	65%	65%	73%	99
I can easily find Colorado wines at my local wine shop or liquor store – T2 Box %	43%	43%	35%	106
I hear more and more about CO wines than I used to– T2 Box %	40%	44%	53%	100

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

WEEKLY+ WINE DRINKERS - CONSUMPTION

- 64% of weekly+ wine drinkers have consumed Colo wine.
- More weekly+ wine drinkers consume wine from different geographies vs. the total sample.
- Over time, weekly+ wine drinkers consume wine from different geographies at the same level.
- California continues to lead penetration of wine drinker consumption – 93% of weekly+ wine drinkers have consumed wine from California in 2019; on par with 2018.

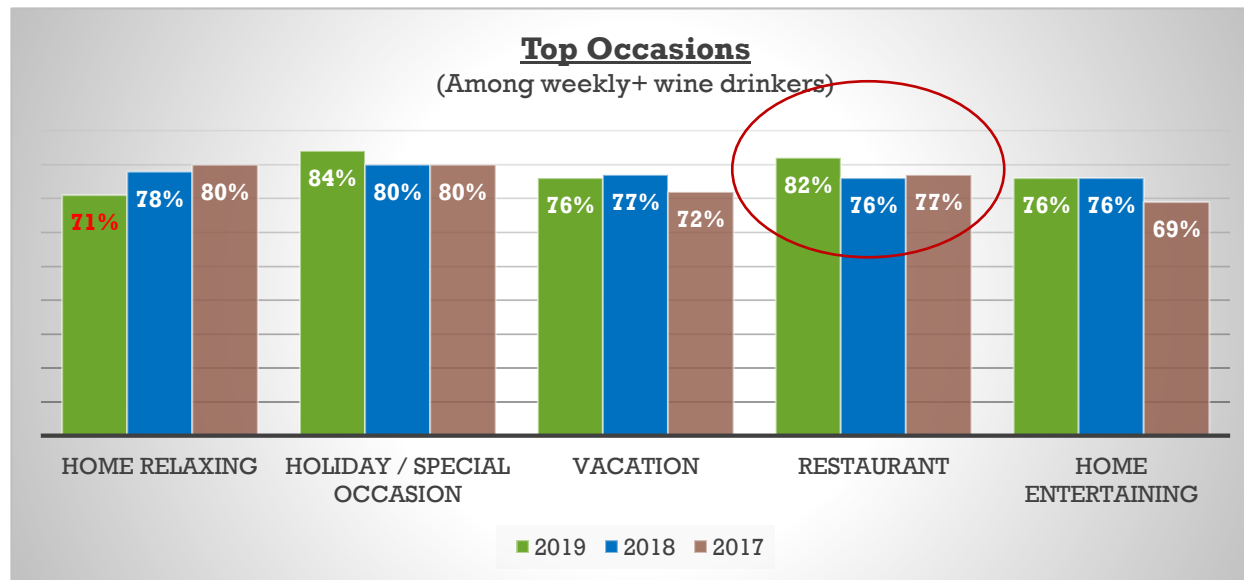
Areas where you have ever consumed wine q 3	2019 Total Sample (n=505)	2019 Weekly + (n=336)	2018 Weekly + (n=350)	2017 Weekly + (n=346)
California	91%	93%	93%	89%
Italy	74%	76%	79%	78%
France	66%	70%	76%	72%
Colorado	64%	66%	72%	66%
Spain	50%	55%	62%	60%
Australia	52%	57%	60%	53%
Argentina	47%	53%	52%	46%
Washington State	36%	41%	42%	35%
Oregon	36%	41%	42%	34%
NY State	17%	19%	20%	19%

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

NOTE: significant differences noted vs. previous year in **Bold red** font at the 95% confidence level.

WEEKLY+ WINE OCCASIONS

- 82% of weekly+ wine drinkers consume wine in restaurants; 84% during Holidays.
- Fewer weekly + wine drinkers (71%) consume wine while at home relaxing in 2019; significantly less than 2018 (78%).

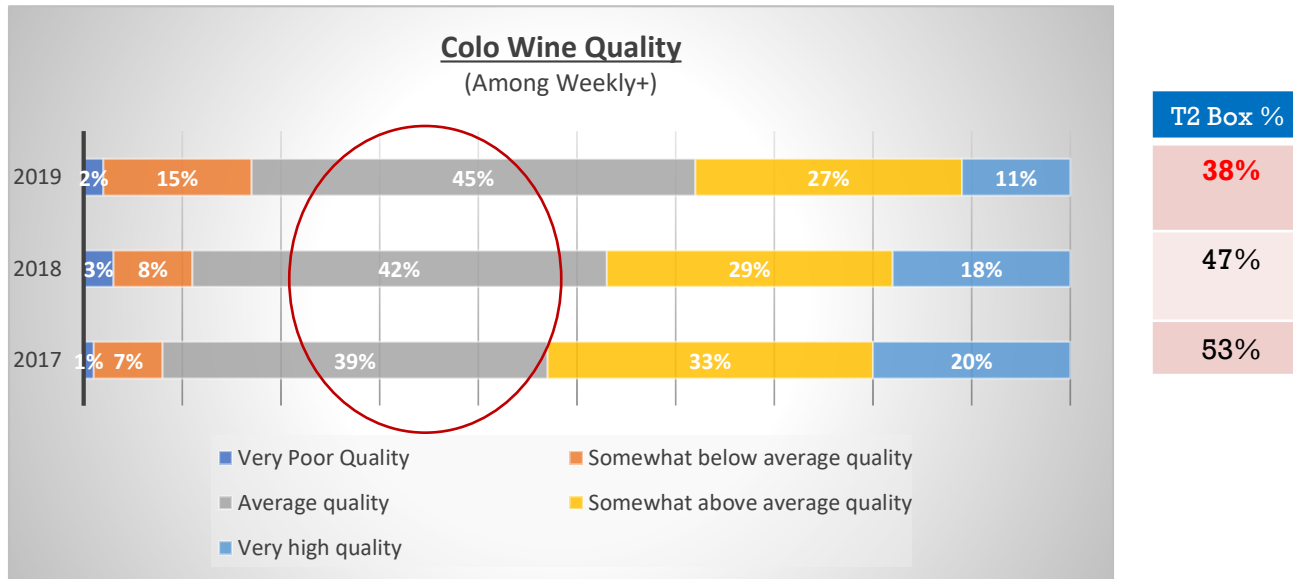


Q. 7 At which of the following occasions have you included wine over the last year or so?

NOTE: significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

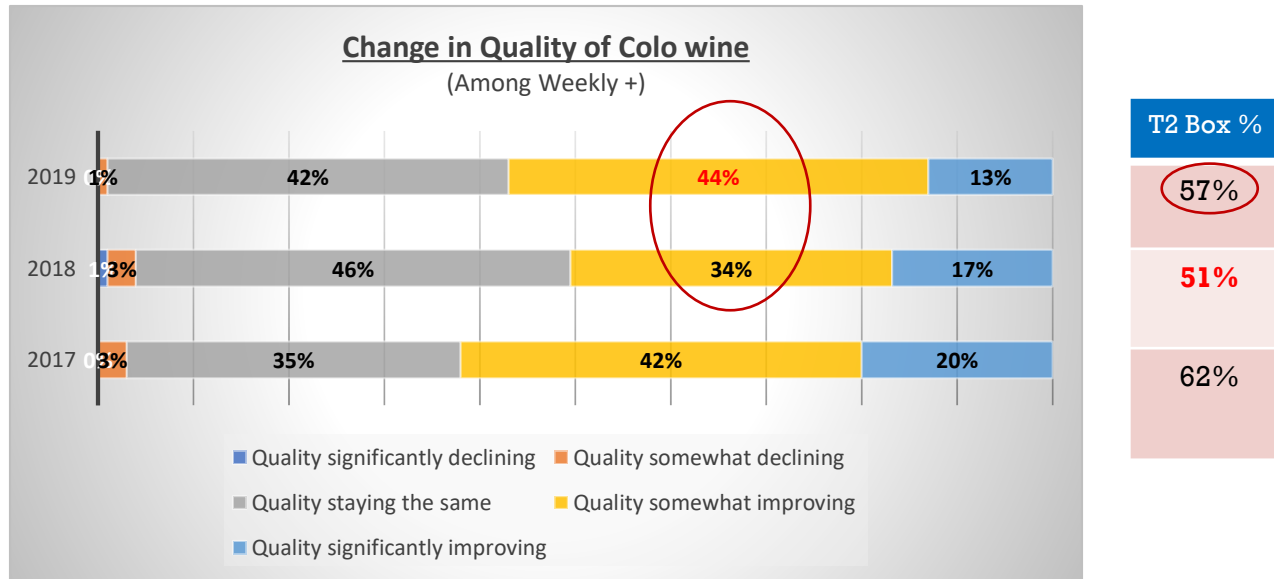
IMPRESSIONS OF QUALITY AMONG WEEKLY+ WINE DRINKERS

- A very large percent of Weekly+ wine drinkers believe Colo wines are average quality (45%).
- 38% (Top 2 Box) of Weekly + wine drinkers believe Colo wines are above average and high quality; this is significantly fewer vs. 2018 (47% T2 Box).



CHANGES IN QUALITY AMONG WEEKLY+ WINE DRINKERS

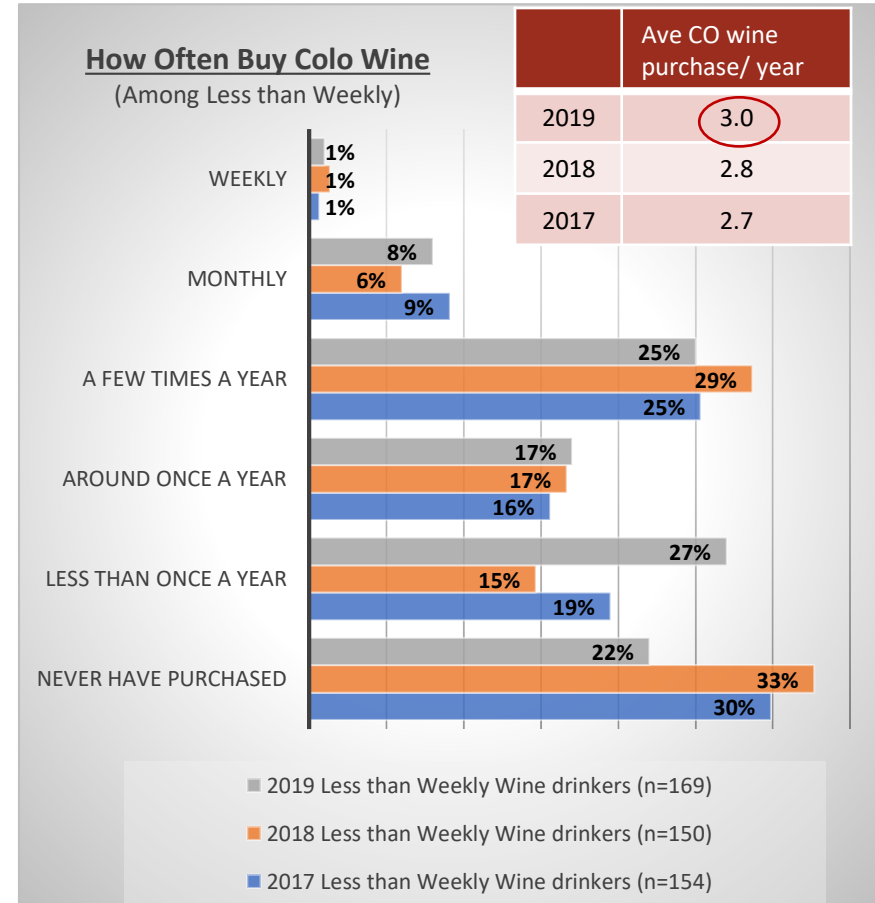
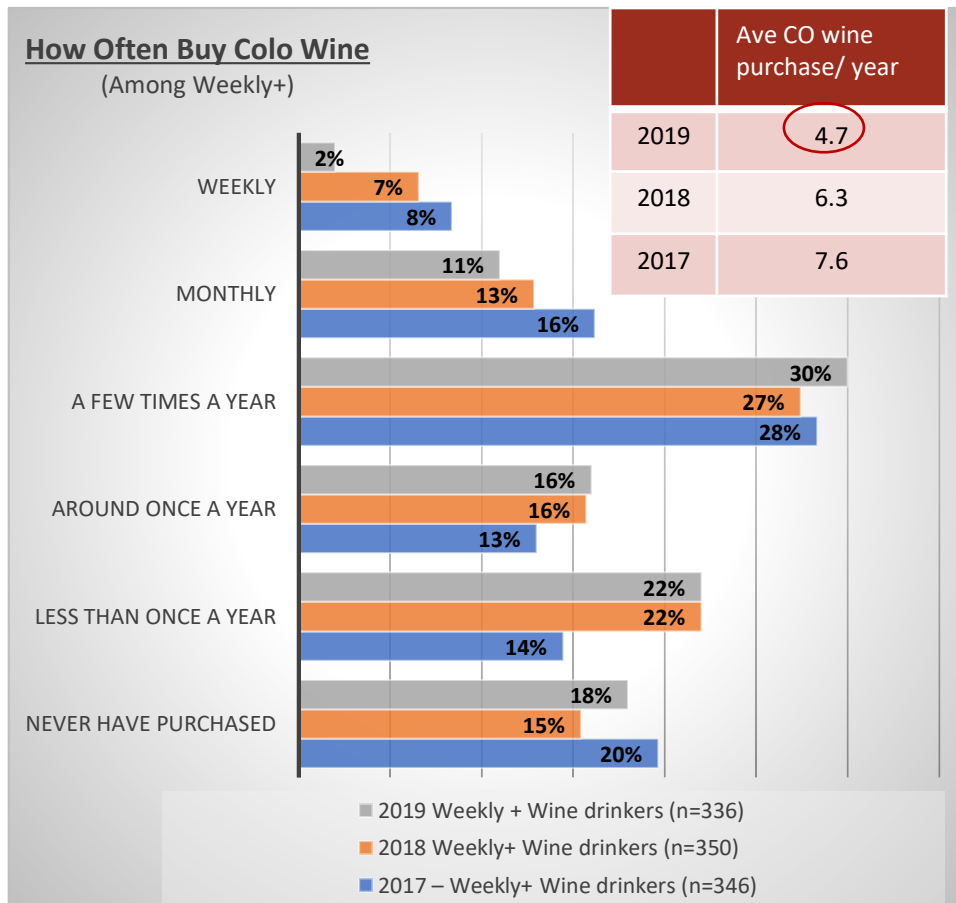
- 57% T2 Box weekly+ wine drinkers believe Colo wines are improving in quality – vs. 51% in 2018. This change is driven by a significant increase in “somewhat improving” score – noted in yellow in the chart below; 42% in 2019, up significantly from 34% in 2018.
- A large percent (42%) of Weekly + wine drinkers believe Colo wine quality is “staying the same” and this trend continues over time (grey bar in chart below).



Q. 12 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). **NOTE:** significant differences vs. previous year - noted in **Bold red** font at the 95% confidence level.

MORE WEEKLY+ WINE DRINKERS PURCHASE COLORADO WINE

- Weekly wine drinkers in 2019, and in past years, are buying Colorado wines more frequently than less frequent drinkers. 13% of 2019 Weekly + wine drinkers purchase wine from Colorado weekly or monthly; however, this is down from 20% in 2018.
- Ave. Colo wine purchases per year in 2019 is 4.7; down from 6.3 in 2018. However, these weekly + drinkers consume more Colo wine on average in 2019 vs. those who wines less than weekly (3.0 ave.).



WEEKLY + DRINKER INTEREST IN FUTURE PURCHASE OF COLO. WINE:

- Future purchase interest for Colorado wines are statistically at parity for both Weekly + (61% T2 Box) and Less than Weekly wine drinkers (67% T2 Box) during 2019.

Future Purchase Intent –of Colorado wine % Top 2 Box (5 pt. scale)	2019	2018	2017
Total Sample – Colorado Wine (n=500)	63%	64%	68%
Colorado Wine -Weekly+ Wine drinkers	61%	65%	69%
Colorado Wine – Less than weekly Wine Drinkers	67%	60%	64%

Q. 10. In the future, how interested are you in purchasing wine from each of the following geographic areas?

WEEKLY+ WINE DRINKERS' SHARE OF COLO WINES

- Weekly+ wine drinkers that allocate 20%+ to Colorado wines remained statistically at parity (30%) in 2019 vs. 2018 (28%).
- 51% of Weekly + wine drinkers allocate less than 9% share to Colo wines.

Percent of total Wine purchases – among Weekly + wine drinkers / Colo wine drinkers	2019 (n=223)	2018 (n=252)	2017 (n=230)
More than 50% of my wine purchases are Colorado wine	7%	4%	7%
25% to 49% of my wine purchases are Colorado wine	12%	14%	16%
20% to 24% of my wine purchases are Colorado wine	11%	10%	16%
10% to 19% of my wine purchases are Colorado wine	15%	17%	18%
1% to 9% of my wine purchases are Colorado wine	29%	31%	29%
Less than 1% of my wine purchases are Colorado wine	22%	18%	13%
I do not purchase Colorado wine	4%	5%	2%

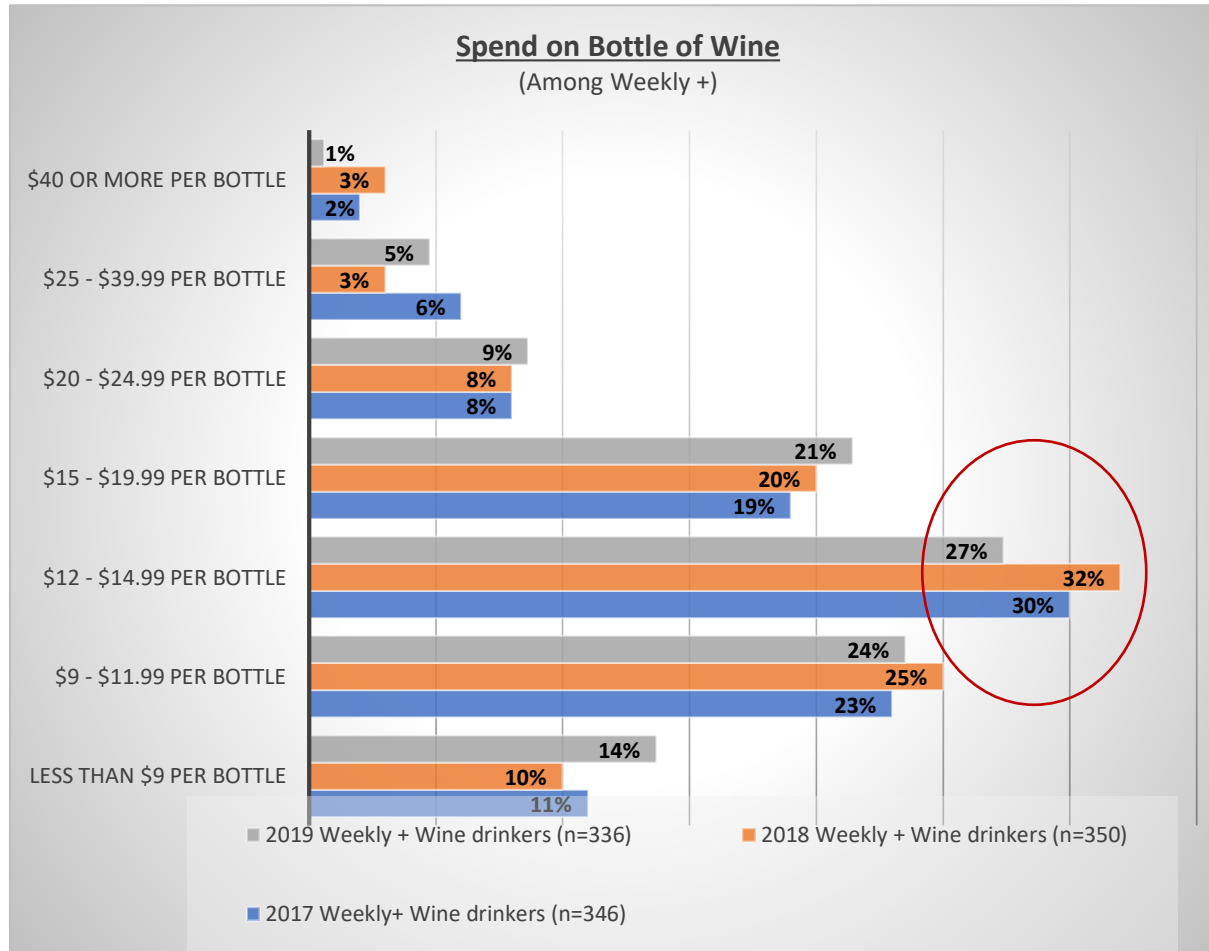
	2019	2018	2017
25%+	19%	19%	23%
20%+	30%	28%	38%

NOTE: significant differences vs. previous year noted in **Bold red** font at the 95% confidence level.

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. (Among those indicating they've consumed Colorado wine – Q. 3)

SWEET SPOT PRICE \$12 - \$14.99

- As with other sub groups, frequent (weekly +) wine drinkers have a larger percent spending \$12 - \$14.99 per bottle (27% in 2019); fewer vs. 2018 (32%) but not significantly so.
- The majority (62%) spend \$9-\$14.99 on a bottle of wine.



} \$9-\$14.99
2019 = 51%

SCORESHEET SUMMARIES BY BALANCE OF SUBGROUPS:

- Age
- Gender
- Hard Cider and Wine drinkers
- Segments
- Experimenters

SCORESHEET – AGE:

- 21-35:** These wine drinkers continue to be the largest age group who allocate 20%+ share to Colorado wines (50%), however, 24% of them have never purchased Colo wine. 80% in this age group are interested in future PI of Colo wines; up from 2018 (72%). This age group is the lowest in Colo Wine awareness (61%).
- 36-50:** 71% of 36-50 have heard of Colorado wines in 2019; significantly down from 81% in 2018. Future PI, is up to 82% T2 Box of this age group; significantly more than 61% T2 Box in 2018.
- 51-70:** This age group continues to be the largest that consume wine on a weekly+ basis (72%) and more have heard of Colo wines (87%) and more have consumed Colo wine (73%), however, only 35% of them allocate 20%+ share to Colo wines. Future PI in Colo wines is significantly up to 74% T2 Box in 2019 from 59% T2 Box in 2018. This group is the most educated with 74% graduating a 4 year college / post graduate degree.

Age	21-35 2019	21-35 2018	21-35 2017	36-50 2019	36-50 2018	36-50 2017	51-70 2019	51-70 2018	51-70 2017
	(n=157)	(n=165)	(n=179)	(n=135)	(n=135)	(n=136)	(n=213)	(n=200)	(n=185)
Heard of CO wine - q 2 (% total)	61%	66%	65%	71%	81%	72%	87%	84%	88%
Consumed CO wine - q3 (% total)	51%	56%	57%	65%	70%	58%	73%	72%	71%
S6 - how often drink any wine (weekly+)	59%	67%	72%	67%	75%	71%	72%	70%	65%
20%+ share of purchase is CO wine - among Colo wine drinkers by age	50%	43%	53%	34%	34%	43%	35%	19%	27%
Have never purchased CO wine	24%	25%	27%	17%	18%	18%	18%	19%	23%
Purchase CO wine monthly, weekly	20%	20%	27%	11%	19%	21%	6%	11%	12%
Future PI CO wine (Top 2 box % – 5 pt. scale)	80%	72%	73%	82%	61%	76%	74%	59%	57%
Typically pay \$9-11.99/bottle	25%	21%	28%	13%	15%	21%	30%	32%	24%
Typically pay \$12-14.99/bottle	34%	37%	28%	30%	33%	37%	25%	35%	29%
Typically pay \$15-19.99/bottle	20%	21%	15%	25%	25%	21%	18%	14%	22%
Grad 4 yr college, Post Grad	61%	66%	61%	69%	64%	65%	74%	65%	68%
Male	29%	39%	29%	38%	51%	38%	56%	49%	39%
Female	71%	61%	71%	62%	49%	62%	44%	51%	61%

NOTE: significantly higher differences vs. previous year noted in **Bold red** font at the 95% confidence level; **bold red font** = significant difference at the 90% confidence level.

SCORESHEET – COLO WINE IMPRESSIONS BY AGE:

- **21-35:** Positive quality impressions for Colo wines are down in 2019, though not significantly so. Many in this age group are interested in Colo wine statements; 81% believe restaurants featuring locally grown food should also feature Colo wines.
- **36-50:** Quality impressions are significantly down to 39% T2 Box in 2019 from 45% in 2018. Significantly more (78% T2 Box) believe restaurants that feature locally grown food should also feature Colo wines.
- **51-70:** 74% T2 Box believe the Colo Wine industry has potential for growth – on par with previous years. Positive quality impressions for Colo wine is down to 36% T2 Box, significantly fewer people vs. 2018 - 44% T2 Box.

Age - impressions of Colo. Wines	21-35	21-35	21-35	36-50	36-50	36-50	51-70	51-70	51-70
	2019	2018	2017	2019	2018	2017	2019	2018	2017
	(n=157)	(n=165)	(n=179)	(n=135)	(n=135)	(n=136)	(n=213)	(n=200)	(n=185)
Quality of CO wine – T2 Box %	39%	46%	51%	39%	45%	56%	36%	44%	46%
Quality improving - CO wine – T2 Box %	61%	52%	62%	47%	49%	60%	56%	50%	55%
Price/quality of CO Wine – % priced fairly	69%	72%	72%	67%	69%	78%	64%	63%	72%
I like to buy and support local growers -T2 box %	73%	72%	81%	67%	69%	75%	60%	63%	70%
Restaurants that feature locally grown food should also feature local wines - T2 Box %	81%	78%	77%	78%	65%	79%	70%	75%	72%
I like to experiment and taste different styles of wines from different regions - T2 B %	75%	76%	78%	75%	68%	82%	69%	67%	74%
I think the Colo wine industry has potential for future growth - T2 Box %	76%	78%	78%	76%	69%	83%	74%	77%	75%
I am interested in visiting Co. wineries - Top 2 Box %	75%	73%	82%	73%	68%	76%	69%	71%	70%
I believe there are quality wines made in Colorado -T 2 Box %	66%	62%	73%	67%	61%	73%	64%	69%	65%
I can easily find Colorado wines at my local wine shop or liquor store -T 2 Box %	41%	49%	35%	39%	41%	37%	39%	36%	29%
I hear more and more about Colo wines than I used to - T 2 Box %	43%	42%	53%	41%	41%	51%	38%	37%	38%

NOTE: significantly higher differences vs. previous year noted in **Bold red** font at the 95% confidence level; non-bold red font = significant differences vs. previous year at the 90% confidence level.

SCORESHEET – GENDER:

- **Males:** 81% have heard of Colorado wines; statistically at parity with previous years. 70% have consumed Colo wine; also flat over time. Significantly more males (80% T2 Box) in 2019 are interested in purchasing Colo wine vs. 62% T2 Box in 2018.
- **Females:** 70% have heard of Colorado wines – statistically lower than males (81%). 60% have consumed Colorado wines; also statistically below males (70%). 77% T2 Box of females are interested in future PI for Colorado wines; up from 66% T2 Box in 2018.

Males vs. Females	Males 2019	Males 2018	Males 2017	Females 2019	Females 2018	Females 2017
	(n=215)	(n=233)	(n=176)	(n=290)	(n=267)	(n=324)
Heard of CO wine - q 2 (% total)	81%	78%	78%	70%	76%	74%
Consumed CO wine - q3 (% total)	70%	69%	67%	60%	64%	60%
S6 - how often drink any wine (weekly+)	75%	71%	74%	60%	69%	67%
20%+ share of purchase is CO wine - among Colo wine drinkers by gender	32%	27%	41%	35%	33%	38%
Have never purchased CO wine	15%	18%	17%	23%	22%	26%
Purchase CO wine monthly, weekly	13%	18%	27%	11%	13%	16%
Future PI CO wine (Top 2 box – 5 pt. scale)	80%	62%	67%	77%	66%	68%
Typically pay \$9-11.99/bottle -	26%	21%	20%	23%	26%	27%
Typically pay \$12-14.99/bottle	23%	35%	31%	34%	35%	31%
Typically pay \$15-19.99/bottle	20%	19%	20%	20%	19%	18%
S9 Grad 4 yr college, Post Grad (%)	73%	74%	68%	65%	57%	63%
Age 21-35 (%)	21%	28%	30%	39%	37%	39%
Age 36-50 (%)	24%	30%	30%	29%	25%	26%
Age 51-70 (%)	55%	42%	41%	32%	38%	35%

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

SCORESHEET – COLO WINE IMPRESSIONS BY GENDER:

- **Males:** Measures are at parity from 2019 to 2018; no significant changes. 73% T2 Box of males believe the Colo wine industry has potential for future growth.
- **Females:** Significantly more females rate a number of Colo wine statements positively vs. their male counterparts. 72% T2 Box of females like to buy and support local growers (vs. 58% T2 Box males).
- 72% of females believe Colo wines are priced fairly – significantly higher vs. males 59%.

Males vs. Females – impressions of Colo. wine	Males 2019	Males 2018	Males 2017	Females 2019	Females 2018	Females 2017
	(n=215)	(n=233)	(n=176)	(n=290)	(n=267)	(n=324)
Quality of CO wine – T2 Box %	40%	45%	53%	39%	45%	49%
Quality improving - CO wine – T2 Box %	58%	54%	64%	53%	47%	56%
Price/quality of CO Wine – % priced fairly	59%	65%	68%	72%	73%	77%
I like to buy and support local growers- T2 Box %	58%	64%	70%	72%	70%	78%
Restaurants that feature locally grown food should also feature local wines -T2 Box %	69%	70%	71%	80%	76%	78%
I like to experiment and taste different styles of wines from different regions - T2 Box %	68%	68%	80%	74%	73%	77%
I think the Colo wine industry has potential for future growth - T2 Box %	73%	73%	78%	76%	77%	78%
I am interested in visiting Co. wineries - T2Box %	68%	68%	72%	74%	73%	78%
I believe there are quality wines made in Colorado T2B%	64%	62%	72%	67%	67%	69%
I can easily find Colorado wines at my local wine shop or liquor store - T2 Box %	43%	45%	44%	38%	39%	27%
I hear more and more about Colo wines than I used to - T2Box %	43%	37%	50%	39%	43%	45%

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

SCORESHEET – HARD CIDER DRINKERS:

- Hard Cider Drinkers vs. the total sample, tend to be:
 - More female (62%)
 - Younger (50% 21-35)
 - Purchase wine more often vs. total (73%)
 - Allocate larger share of wine purchase to Colo wine (50%) vs. total (34%)
 - Less aware of Colo wines (69%)

Hard Cider drinkers	TOTAL	2019	2018	2017
	(n=505)	(n=124)	(n=130)	(n=115)
Heard of CO wine - q 2 (% total)	75%	69%	78%	83%
Consumed CO wine - q3 (% total)	64%	61%	69%	71%
S6 - how often drink any wine (weekly+)	67%	73%	79%	82%
20%+ share of purchase is CO wine - among Colo wine drinkers by among cider drinkers	34%	50%	44%	51%
Have never purchased CO wine	20%	21%	18%	21%
Purchase CO wine monthly, weekly	12%	20%	27%	35%
Future PI CO wine (Top 2 box – 5 pt. scale)	63%	67%	76%	77%
Typically pay \$9-11.99/bottle -	24%	20%	24%	26%
Typically pay \$12-14.99/bottle	29%	38%	39%	23%
Typically pay \$15-19.99/bottle -	20%	19%	16%	21%
Age 21-35 (%)	31%	50%	52%	56%
Age 36-50 (%)	27%	32%	28%	30%
Age 51-70 (%)	42%	18%	20%	15%
S9 Grad 4 yr college, Post Grad (%)	69%	65%	70%	65%
Male	43%	38%	51%	38%
Female	57%	62%	49%	62%

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

SCORESHEET – COLO. WINE IMPRESSIONS AMONG HARD CIDER DRINKERS:

- Hard Cider Drinkers' impressions of Colorado wines are statistically at parity from 2019 to 2018.
- Several areas are significantly down spanning two years - comparing 2019 vs. 2017. These include:
 - Quality of Colo wine
 - Quality improving of Colo wine
 - I like to buy and support local growers
 - I hear more about Colo wines than I used to
 - I believe there are quality wines made in Colo
 - I like to experiment and taste different styles

Hard Cider drinkers	2019	2018	2017
	(n=124)	(n=130)	(n=115)
Quality of CO wine – T2 Box %	43%	51%	57%
Quality improving - CO wine - T2 Box %	62%	59%	75%
Price/quality of CO Wine - priced fairly - T2 Box %	72%	62%	72%
I like to buy and support local growers – T2 Box %	73%	82%	90%
Restaurants that feature locally grown food should also feature local wines – T2 Box %	81%	86%	88%
I like to experiment and taste different styles of wines from different regions – T2 Box %	77%	79%	88%
I think the Colo wine industry has potential for future growth – T2 Box %	81%	86%	88%
I am interested in visiting Co. wineries – T2 Box %	79%	78%	87%
I believe there are quality wines made in Colorado - % T2 Box	68%	72%	83%
I can easily find Colorado wines at my local wine shop or liquor store - % T2 Box	46%	45%	41%
I hear more and more about Colo wines than I used to - % T2 Box	47%	52%	65%

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

SEGMENTS OF WINE DRINKERS:

- In 2018, CWIDB added a new question based on wine industry articles that indicate there are segments of wine drinkers, motivated by differing needs.
- Of the segments below, Traditionalist, Overwhelmed and Image are too small to read as a separate group. This does not mean that these segments don't exist, but could mean that as described below, we "missed" connecting with these types of wine drinkers.

SEGMENTS 2019	Among the total sample	% Total 2019	% Total 2018
Traditionalist (n=33)	I tend to drink a range of wines from established, well-known wineries.	7%	13%
Enthusiast (n=147)	I feel comfortable with my knowledge of wine, which might be more than the average wine drinker. I like to take my time to browse the wine section to seek out new and interesting wines.	29%	30%
Overwhelmed (n=46)	I am sometimes a little overwhelmed or confused by all the choices on a wine list or at a liquor store, which leaves me at a loss as to what kind of wine I want to buy or drink.	9%	11%
Savvy (n=97)	I enjoy shopping at different stores in search of the best deals and discovering new wines. I always have a few favorites to fall back on to supplement my discoveries.	19%	20%
Satisfied Sipper (n=161)	I feel that I don't know a lot about wine, but I do know what wines I like. I tend to drink the same wines that I know I like.	32%	25%
Image (n=21)	I sometimes use the Internet to seek out highly-rated wines, new innovations and to learn more about wines. I am often the first among my friends to try a wine.	4%	1%

Q. 8 When you drink or purchase wine - which of the following statements describes you the best?

SCORESHEET - SEGMENTS OF WINE DRINKERS:

- **Enthusiast** – is the largest segment and vs. the other two, skews heavier male (57%) & older as 59% are ages 51-70. Largest group (72%) to have consumed Colo wine. Significantly fewer (10%) in 2019 vs. 2018 (25%) to purchase Colo wine weekly or monthly. Spend the most on average for a bottle of wine (\$15.77). Positive quality impressions for Colo wine is significantly down – among 29% T2 Box in 2019 vs. 52% T2 Box in 2018.
- **Savvy** – Significantly fewer are aware of Colo wines (71% in 2019) vs. 84% in 2018. 60% are female. Highest group showing interest in future to purchase CO wine (69% T2 Box). Around half (51% T2 Box) perceive Colo wine to be of good quality – this is higher than other segments but still significantly lower than California wine quality impressions (79% T2Box).
- **Satisfied Sipper** – Smallest group to have consumed Colo wine – 57%. Only 9% purchase Colo wine weekly or monthly – only 35% T2 Box believe Colo wines are good quality in 2019. Along with Savvy, spend \$13.12 on average for a bottle of wine, less than Enthusiasts at \$15.77.

Segments - 2018 vs. 2019	Enthusiast 2019	Enthusiast 2018	Savvy 2019	Savvy 2018	Satisfied Sipper 2019	Satisfied Sipper 2018
	(n=147)	(n=152)	(n=97)	(n=98)	(n=161)	(n=126)
Weekly + Wine drinker (S6)	80%	83%	77%	78%	56%	52%
% male	57%	63%	40%	30%	31%	37%
Denver Metro resident	60%	53%	59%	50%	50%	54%
21-35	20%	29%	36%	35%	34%	32%
36-50	21%	32%	35%	28%	22%	19%
51-70	59%	40%	29%	38%	44%	49%
Grad 4 yr college, Post grad (% S9)	80%	70%	58%	63%	66%	53%
% Aided Aware of Colorado Wine Q2	84%	85%	71%	84%	70%	68%
% Consume Colorado Wine based to total	72%	78%	63%	67%	57%	56%
% Consume Colorado Wine among those aware of CO wine	86%	92%	88%	81%	82%	82%
% purchase CO wine weekly or monthly – Q 9	10%	25%	22%	12%	9%	3%
Have never purchased Colo wine - Q9	16%	15%	17%	17%	26%	30%
20%+ share of purchase is Colo wine – q 18	22%	30%	43%	36%	38%	23%
% T2 Box Future PI – q 10 – COLORADO	56%	64%	69%	75%	60%	56%
% T2 Box Future PI – q 10 CALIFORNIA	88%	91%	91%	87%	80%	82%
% T2 Box Future PI – q 10 EUROPE	85%	88%	87%	80%	65%	57%
Live in Metro Denver	64%	62%	66%	76%	73%	71%
Quality perception – Colorado wine – T2 Box %	29%	52%	51%	48%	35%	34%
Quality perception – California wine – T2 Box %	88%	86%	79%	77%	74%	74%
Typically Spend on Wine – Average – Q 5	\$ 15.77	\$ 16.72	\$ 12.38	\$ 13.12	\$ 12.38	\$ 11.98

NOTE: significantly different vs. previous year noted in **Bold red** font at the 95% confidence level; non bold red font=the 90% confidence level

SCORESHEET –EXPERIMENTERS:

- Those who state top 2 box % on *“I like to experiment and taste different styles of wine and wines from different regions”* (q 21) are called **EXPERIMENTERS**. In 2019, we looked at these wine drinkers separately.
- Experimenters tend to skew younger and female. Significantly more of them have consumed Colo wine (67%).
- 67% T2 Box state future PI in Colo wines – significantly more than non- Experimenters (51% T2 Box).
- Not surprisingly, Experimenters align with the Enthusiast Segment (*I feel comfortable with my knowledge of wine, which might be more than the average wine drinker. I like to take my time to browse the wine section to seek out new and interesting wines.*)

Experimenters (n=244) Top 2 Box % Agree “like to experiment and taste different styles of wines and wine from different regions”	Experimenters	Non-Experimenters
	2019 (n=363)	2019 (n=142)
Heard of CO wine (q 2)	76%	73%
Consumed CO wine – (q3)	67%	56%
Weekly + wine drinkers; How often drink any wine (q S6)	68%	62%
20%+ share of purchase is CO wine (q18)	34%	33%
Have never purchased CO wine (q 9)	17%	27%
Purchase CO wine monthly, weekly (q9)	14%	7%
Future PI CO wine (%Top 2 box – 5 pt. scale – q 10)	67%	51%
Top Segment for Experimenters – Enthusiasts (q 8)	34%	18%
2nd Segment for Experimenters - Satisfied Sippers	25%	50%
Colo wines priced fairly (q13)	65%	70%
Typically spend on wine \$9-11.99 (q5)	24%	25%
Typically spend on wine \$12-14.99 (q5)	32%	23%
Typically spend on wine \$15-19.99 (q5)	21%	19%
Grad 4 yr college, Post Grad (%) (qS9)	69%	68%
Age 21-35 (%/ index to total)	32% / 103	29%/ 93
Age 36-50 (% / index to total)	28% / 104	24%/ 90
Age 51-70 (%/ index to total)	40% / 95	47%/ 112
% Male (%/ index to total)	41% / 95	48% / 112
% Female (% / index to total)	59% / 104	52%/ 91

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

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Thank you.

