



~Topline Report~
Tracking Study of KPIs
Colorado Wine Industry Development Board
April 10, 2020

Background:

- The Colorado Wine Industry Development Board (CWIDB) has tracked Colorado wine drinkers' attitudes and usage of Colorado wines each spring, since 2014.
- In 2020, a pared-down survey was conducted to measure KPIs (Key performance indicators) among Colorado wine drinkers.
- This report is a topline of key measures among the total sample comparing three years of data. No summary or recommendations are included in this topline.
- As a bonus, banner breaks comparing gender, age, aware of Colo wines vs. unaware and consumed Colo wines vs. not consumed are in the excel spreadsheet of data - sent separately.

Objectives:

- Compare statistically relevant changes in 2020 vs. 2019 vs. 2018 KPIs (awareness, usage, purchase locations and attitudes) toward Colorado wines among the total sample of monthly wine drinkers in Colorado.
- Save costs with a shorter questionnaire, results among the total sample only and a smaller base size.

Respondent Criteria:

- N= 250; mix males, females (no more than 60%)
- Ages 21-70 - quotas set at 21-35 (30%), 36-50 (30%), 51-70 (40%) to align w/ previous tests
- Colorado residents
- Past month wine consumption
- Consumption frequency quotas to ensure respondent mix comparable to previous tests:
 - 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%*

Key Findings

1. Awareness (Q1)

- Awareness of Colo Wine remains 75%.
- California, Italy, France significantly fell in Awareness during 2020.
- Washington Oregon and New York states rose significantly in Awareness in 2020.

	2020 (n=252)	2019 (n=505)	2018 (n=500)
California	89%	96%	96%
Italy	89%	96%	93%
France	85%	91%	92%
Spain	81%	85%	82%
Colorado	75%	75%	77%
Australia	68%	68%	66%
Washington State	67%	56%	57%
Argentina	66%	70%	65%
Oregon	65%	56%	58%
New York State	44%	37%	35%

Note: *Red font* = significant difference vs. previous year at the 90% confidence level.

2. Consumption (Q2)

- 68% have ever consumed Colorado wine
- California consumption is significantly down from 2019 and 2018 to 85%.
- Spain, Oregon and Washington state are significantly up in ever consumed.

	2020 (n=252)	2019 (n=505)	2018 (n=500)
California	85%	91%	91%
Italy	71%	74%	73%
France	69%	66%	70%
Colorado	68%	64%	66%
Spain	57%	50%	57%
Australia	56%	52%	55%
Oregon	46%	36%	38%
Washington State	47%	36%	37%
Argentina	47%	47%	46%
New York State	21%	17%	17%

Note: *Red font* = significant difference vs. previous year at the 90% confidence level.

3. Quality measures:

- **Q6 Quality** – European wines significantly dropped in quality to 83% from 89% in 2019, though is still the highest in overall quality ratings.

Quality of wine (T2 Box % – 5 pt. scale)	2020 T2 Box % (n=252)	2019 T2 Box % (n=505)	2018 T2 Box % (n=500)
European wines	83%	89%	83%
California wines	79%	80%	79%
Colorado wines	41%	39%	45%

Note: *Red font* = significant difference vs. previous year at the 90% confidence level.

- **Q7 Change in quality for Colorado wines** – remains statistically at parity over time.

Colorado wines over time	Quality significantly declining	Quality somewhat declining	Quality staying about the same	Quality somewhat improving	Quality significantly improving
Colorado wine - 2020	2%	2%	48%	40%	9%
Colorado wine - 2019	1%	1%	43%	43%	12%
Colorado Wine - 2018	0%	2%	47%	35%	16%

- **Q8 Price for quality** – remains statistically the same over time.

Total wine drinkers	Extremely underpriced	Somewhat underpriced	Fairly priced	Somewhat overpriced	Extremely overpriced
European wine - 2020	1%	1%	50%	42%	7%
European wine - 2019	0%	2%	44%	47%	7%
European wine - 2018	0%	1%	45%	47%	7%
California wine - 2020	1%	2%	68%	25%	5%
California wine - 2019	0%	1%	68%	37%	3%
California wine - 2018	0%	1%	69%	26%	4%
Colorado wine - 2020	1%	2%	63%	27%	7%
Colorado wine - 2019	1%	4%	67%	26%	3%
Colorado wine - 2018	0%	2%	69%	24%	5%

4. Future PI (q4)

- Future purchase intent is statistically lower for Colorado wines and statistically higher for So. American wine in 2020.

Top 2 box purchase intent (5 pt scale)	2020	2019	2018
	(n=252)	(n=505)	(n=500)
California wine	82%	86%	86%
European wine	82%	78%	76%
Colorado wine	56%	63%	64%
Australia or New Zealand	62%	61%	63%
So. American wine	69%	57%	63%
Washington or Oregon wine	59%	57%	58%

Note: *Red font* = significant difference vs. previous year at the 90% confidence level.

5. Share of purchase locations (q11)

- Neighborhood liquor stores continue to make up the largest percent of wine purchases.

	2020	2019	2018
	(n=252)	(n=505)	(n=500)
Neighborhood liquor store	43%	32%	36%
Large, volume discount liquor store	16%	20%	24%
Restaurants	7%	13%	10%
Grocery stores or Membership warehouses that sell wine*	13%	12%	7%
Bars	3%	5%	6%
Wine Club	4%	4%	5%
Wine specialty shop	6%	5%	4%
Winery or wine tasting room	5%	4%	4%
Internet	3%	2%	2%
Farmer's markets	1%	1%	1%

Note: *Red font* = significant difference vs. previous year at the 90% confidence level.

6. Frequency of Purchase (Q3)

- Colorado wine is purchased weekly or monthly by 16%.
- Australia or New Zealand wine significantly improved in purchase frequency (weekly or monthly) to 19% in 2020, up from 11% in 2019.

Frequency of purchase	2020	2019	2018
Weekly + Monthly			
European wine (e.g. France, Italy, Germany, etc.)	27%	25%	21%
California wine	39%	40%	40%

Colorado wine	16%	12%	16%
Washington and Oregon wine	12%	8%	11%
Australia or New Zealand wine	19%	11%	13%
South American wine (e.g. Argentina, Chile, etc.)	15%	11%	14%

Note: *Red font* = significant difference vs. previous year at the 90% confidence level.

7. Typical Spend (Q5)

- As in previous years, most spend between \$9 -\$19.99 per bottle.

Typical spend per bottle	2020	2019	2018
Total	N=252	N=505	N=500
Less than \$9.00 per bottle	8%	11%	10%
\$9.00 - \$11.99 per bottle	25%	24%	24%
\$12.00 - \$14.99 per bottle	29%	29%	35%
\$15.00 - \$19.99 per bottle	23%	20%	19%
\$20.00 - \$24.99 per bottle	9%	10%	7%
\$25.00 - \$39.99 per bottle	5%	4%	3%
\$40.00 or more per bottle	1%	1%	2%

8. Where seen/heard Colo. Wines (Q9)

- Most Colo wine drinkers continue to hear about Colo wines at liquor or wine stores

Where Heard about Colo Wine	2020	2019
Base – consumed Colo wines	N=170	N=323
At a liquor store or wine store	75%	65%
At a winery or wine tasting room	54%	55%
Word of mouth - from friends, family, etc.	44%	49%
Events, wine tasting	43%	45%
At a restaurant	47%	37%
Social Media	17%	15%
Magazines	15%	13%
Billboards / advertising	11%	10%

Note: *Red font* = significant difference vs. previous year at the 90% confidence level.
Question not asked in 2017

9. What percent of overall wine purchase is for Colo wines (Q 10)

- Among Colo wine drinkers, 25% say that 25% -50% of wine purchases are to Colo wines.
- NOTE – data comparing 2020 to 2019 are not comparable due to different % ranges.

share	2020	2019	2018
25%+	25%	21%	22%

Percent of total Wine purchases – among CO. wine drinkers	2020 (n=170)	2019 (n=323)	2018 (n=332)
More than 50% of my wine purchases are Colorado wine	8%	9%	6%
25% to 49% of my wine purchases are Colorado wine	17%	12%	16%
20% to 24% of my wine purchases are Colorado wine	Na	12%	8%
10% to 24% of my wine purchases are Colorado wine	24%		
10% to 19% of my wine purchases are Colorado wine	Na	13%	19%
1% to 9% of my wine purchases are Colorado wine	28%	29%	30%
Less than 1% of my wine purchases are Colorado wine	18%	20%	16%
I do not purchase Colorado wine	5%	5%	5%

10. Impressions of Colo. Wines (Q12)

- Significant improvements during 2020 were seen for:
 - Easily find Colo wines
 - Support local growers
 - Craftsmanship
 - Online
- Significantly more people said that Colo wines are “too sweet” – up to 23% in 2020 (almost ¼ of respondents) from 16% in 2019.

Total Sample	2020 (n=252)	2019 (n=505)	2018 (n=500)
% Top 2 Box – 5 pt. scale (Strongly, Somewhat Agree)			
I believe there are quality wines made in Colorado	71%	66%	65%
I can easily find Colorado wine at my local wine shop or liquor store	67%	40%	42%
I like to buy Colorado and support local growers	78%	66%	67%
I like to buy wine with the Colorado Proud logo on the label	Na	40%	43%
I think Colorado wines are too sweet	23%	16%	16%

I think of wines made in Colorado in the same way I do locally grown produce	55%	52%	54%
Craftsmanship is apparent in Colorado wines	50%	40%	43%
I am interested in visiting Colorado wineries	76%	72%	71%
I am interested in Colorado wine tasting events	71%	69%	66%
I see and hear more and more about Colorado wines than I used to	Na	41%	40%
I think the Colorado wine industry has potential for future growth	74%	75%	75%
Restaurants that feature locally grown food should also feature local wines	78%	75%	73%
Grapes in Colorado are exposed to cooler nights and hotter days which leads to better wines	Na	34%	39%
I like to experiment and taste different styles of wine and wines from different regions	Na	72%	70%
I can easily order Colorado wine online. NEW IN 2018	41%	27%	27%
I am interested in tasting different styles of Colorado wines (e.g. Cabernet Franc, Petit Verdot or Malbec) NEW IN 2020	71%	Na	Na

Na = question not asked

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