



**~Topline Report~**  
**Tracking Study of KPIs**  
**Colorado Wine Industry Development Board**  
March 8, 2021

**Background:**

- The Colorado Wine Industry Development Board (CWIDB) has tracked Colorado wine drinkers' attitudes and usage of Colorado wines each spring, since 2014.
- In 2021 and in 2020, a shorter survey was conducted, measuring KPIs (Key performance indicators) among monthly wine drinkers living in Colorado.
- 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 report.
- A separate Excel banner of all data will be sent along with this topline report.
- Note that in 2021, the ongoing Covid-19 pandemic may have affected results.

**Objectives:**

- Compare statistically relevant changes in 2021 vs. 2020 vs. 2019 KPIs (awareness, usage, purchase locations and attitudes) toward Colorado wines among the total sample of monthly wine drinkers in Colorado.

**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 Colorado Wine in 2021 is 71%, statistically at parity to previous years.
- California, Italy, Spain, Australia, Washington State and Oregon all significantly dropped in Awareness of wine from each geography during 2021; noted in red text in the chart below.
- No wine geographies increased in Awareness in 2021.

Awareness of wine by geography	2021 (n=251)	2020 (n=252)	2019 (n=505)
California	82%	89%	96%
Italy	81%	89%	96%
France	82%	85%	91%
Spain	74%	81%	85%
Colorado	71%	75%	75%
Australia	60%	68%	68%
Washington State	51%	67%	56%
Argentina	60%	66%	70%
Oregon	50%	65%	56%
New York State	40%	44%	37%

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

### 2. Consumption (Q2)

- 66% have “ever consumed” Colorado wine in 2021, statistically at parity to previous years.
- California wine consumption (78%) is significantly down from both 2020 and 2019.
- Australia, Oregon, Washington and Argentina wines also are significantly down in 2021 for “ever consumed.”

Consumption of wine by geography	2021 (n=251)	2020 (n=252)	2019 (n=505)
California	78%	85%	91%
Italy	67%	71%	74%
France	64%	69%	66%
Colorado	66%	68%	64%
Spain	50%	57%	50%
Australia	44%	56%	52%
Oregon	37%	46%	36%
Washington State	39%	47%	36%
Argentina	39%	47%	47%
New York State	23%	21%	17%

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

### 3. Quality measures:

- **Q6 Quality** – Impressions of quality of wine from Europe, California and Colorado remained statistically at parity in 2021 vs. 2020.

Quality of wine (T2 Box % – 5 pt. scale)	2021 T2 Box % (n=251)	2020 T2 Box % (n=252)	2019 T2 Box % (n=505)
European wines	83%	83%	89%
California wines	79%	79%	80%
Colorado wines	46%	41%	39%

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

- **Q7 Change in quality for Colorado wines** – Colorado wine is viewed as “quality significantly improving” among 18% of respondents. This is significantly higher vs. 2020 (9%) and 2019 (12%).

Colorado wines over time	Quality significantly declining	Quality somewhat declining	Quality staying about the same	Quality somewhat improving	Quality significantly improving
Colorado wine - 2021	0%	3%	43%	37%	18%
Colorado wine - 2020	2%	2%	48%	40%	9%
Colorado wine - 2019	1%	1%	43%	43%	12%

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

- **Q8 Price for quality** – remains statistically the same over time for wine from each geography.

Total wine drinkers	Extremely underpriced	Somewhat underpriced	Fairly priced	Somewhat overpriced	Extremely overpriced
European wine - 2021	1%	2%	47%	39%	12%
European wine - 2020	1%	1%	50%	42%	7%
European wine - 2019	0%	2%	44%	47%	7%
California wine - 2021	1%	1%	65%	26%	8%
California wine - 2020	1%	2%	68%	25%	5%
California wine - 2019	0%	1%	68%	37%	3%
Colorado wine - 2021	0%	6%	63%	23%	8%
Colorado wine - 2020	1%	2%	63%	27%	7%
Colorado wine - 2019	1%	4%	67%	26%	3%

#### 4. Future PI (q4)

- Future purchase intent is statistically higher for Colorado wines in 2021 (65% T2 Box) vs. 2020 (56% T2 Box).
- Purchase interest for So. American wine declined significantly in 2021 (59%) vs. 2020 (69%).
- Wine from all other geographies has statistically similar future purchase interest.

Top 2 box purchase intent (5 pt. scale)	2021	2020	2019
	(n=251)	(n=252)	(n=505)
California wine	83%	82%	86%
European wine	77%	82%	78%
Colorado wine	65%	56%	63%
Australia or New Zealand	58%	62%	61%
So. American wine	59%	69%	57%
Washington or Oregon wine	65%	59%	57%

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 (38%).

Share of purchase locations	2021	2020	2019
	(n=251)	(n=252)	(n=505)
Neighborhood liquor store	38%	43%	32%
Large, volume discount liquor store	15%	16%	20%
Restaurants	6%	7%	13%
Grocery stores or Membership warehouses that sell wine	13%	13%	12%
Bars	4%	3%	5%
Wine Club	5%	4%	4%
Wine specialty shop	9%	6%	5%
Winery or wine tasting room	4%	5%	4%
Internet	5%	3%	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 27% of respondents in 2021; significantly more than 2020 (16%).
- Washington / Oregon wine is also significantly higher in 2021 (22%) vs. 2020 (12%) in weekly and monthly purchases among respondents.

Frequency of purchase	2021	2020	2019
<b>Weekly + Monthly</b>	(n=251)	(n=252)	(n=505)
European wine (e.g. France, Italy, Germany, etc.)	29%	27%	25%
California wine	43%	39%	40%
Colorado wine	27%	16%	12%
Washington and Oregon wine	22%	12%	8%
Australia or New Zealand wine	20%	19%	11%
South American wine (e.g. Argentina, Chile, etc.)	17%	15%	11%

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	2021	2020	2019
<b>Total</b>	N=251	N=252	N=505
Less than \$9.00 per bottle	2%	8%	11%
\$9.00 - \$11.99 per bottle	23%	25%	24%
\$12.00 - \$14.99 per bottle	24%	29%	29%
\$15.00 - \$19.99 per bottle	21%	23%	20%
\$20.00 - \$24.99 per bottle	17%	9%	10%
\$25.00 - \$39.99 per bottle	8%	5%	4%
\$40.00 or more per bottle	6%	1%	1%

## 8. Where seen/heard Colorado Wines (Q9)

- Most (63%) of Colorado monthly wine drinkers continue to hear about Colorado wines at liquor or wine stores, however, this is significantly less than 75% in 2020.
- Winery / tasting rooms, restaurants and wine tasting events also continue to be where respondents hear / see Colorado wines.

Where Heard about Colorado Wine	2021	2020	2019
Base – consumed Colorado wines	N=166	N=170	N=323
At a liquor store or wine store	63%	75%	65%
At a winery or wine tasting room	55%	54%	55%
Word of mouth - from friends, family, etc.	38%	44%	49%
Events, wine tasting	42%	43%	45%
At a restaurant	45%	47%	37%
Social Media	23%	17%	15%
Magazines	21%	15%	13%
Billboards / advertising	13%	11%	10%

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

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

- Among Colorado wine drinkers, 36% say that 25% -50% of wine purchases are to Colorado wines. This is significantly higher than 25% in 2020.
  - Driving this increase during 2021 are respondents who allocate more than 50% to Colorado wine – 19%; significantly higher than 8% in 2020.
- \*NOTE – data comparing 2020 to 2019 are not comparable due to different % ranges. Noted by Na in second chart below*

% share	2021 (n=166)	2020 (n=170)	2019 (n=323)
25%+	36%	25%	21%*

Percent of total Wine purchases – among Colorado wine drinkers	2021 (n=166)	2020 (n=170)	2019 (n=323)
More than 50% of my wine purchases are Colorado wine	19%	8%	9%
25% to 49% of my wine purchases are Colorado wine	17%	17%	12%
20% to 24% of my wine purchases are Colorado wine	Na	Na	12%

10% to 24% of my wine purchases are Colorado wine	23%	24%	Na
10% to 19% of my wine purchases are Colorado wine	Na	Na	13%
1% to 9% of my wine purchases are Colorado wine	20%	28%	29%
Less than 1% of my wine purchases are Colorado wine	19%	18%	20%
I do not purchase Colorado wine	2%	5%	5%

## 10. Impressions of Colorado Wines (Q12)

- Significant improvements during 2021 vs. 2020 were seen for:
  - Easily order Colorado wines online
  - Craftsmanship
  - Interest in tasting styles of Colorado wine
- Significantly more respondents in 2021 (32%) said that Colo wines are “too sweet” – this impression is trending significantly up over time.

Total Sample	2021	2020	2019
% Top 2 Box – 5 pt. scale (Strongly, Somewhat Agree)	(n=251)	(n=252)	(n=505)
I believe there are quality wines made in Colorado	73%	71%	66%
I can easily find Colorado wine at my local wine shop or liquor store	67%	67%	40%
I like to buy Colorado and support local growers	73%	78%	66%
I like to buy wine with the Colorado Proud logo on the label	Na	Na	40%
I think Colorado wines are too sweet	32%	23%	16%
I think of wines made in Colorado in the same way I do locally grown produce	59%	55%	52%
Craftsmanship is apparent in Colorado wines	61%	50%	40%
I am interested in visiting Colorado wineries	77%	76%	72%
I am interested in Colorado wine tasting events	75%	71%	69%
I see and hear more and more about Colorado wines than I used to	Na	Na	41%
I think the Colorado wine industry has potential for future growth	78%	74%	75%
Restaurants that feature locally grown food should also feature local wines	80%	78%	75%
Grapes in Colorado are exposed to cooler nights and hotter days which leads to better wines	Na	Na	34%

I like to experiment and taste different styles of wine and wines from different regions	Na	Na	72%
I can easily order Colorado wine online. NEW IN 2018	49%	41%	27%
I am interested in tasting different styles of Colorado wines (e.g. Cabernet Franc, Petit Verdot or Malbec) NEW IN 2020	79%	71%	Na

Na = question not asked in that year.

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