

Wine Industry Survey Dec 2008

1. Your view of the wine industry

Thank you for taking the time to complete this survey. There are 37 questions on 11 pages, some of which will appear only for wineries. The focus of this survey is primarily the Colorado Wine Industry Development Board as a whole as well as its marketing and promotion programs. Another survey early next year will focus on research programs.

The information you provide will assist the Colorado Wine Industry Development Board in crafting its strategic plan for Fiscal Year 2010, which begins 1 July 2009. We urge you to be a part of this process, creating a bigger and better future for the Colorado wine industry. We need your input to determine how best to spend the nearly \$600,000 in the State's Wine Development Fund, paid for by the per liter tax you pay to the Department of Revenue. Thanks again for your time and input.

If you have any questions or problems with this survey, please don't hesitate to call Doug Caskey, CWIDB executive director (720.034.3406) for assistance. Thank you.

1. Thinking generally about the wine industry, your current attitude toward the industry as a whole is

- Very positive
- Somewhat positive
- Neither positive or negative
- Somewhat negative
- Very negative

Comments

2. Now thinking specifically about the Colorado wine industry, your current attitude toward the industry as a whole is

- Very positive
- Somewhate positive
- Neither positive or negative
- Somewhat negative
- Very negative

Comments

3. In your opinion, would you say the Colorado wine industry is

Definitely headed in the right direction

Headed somewhat in the right direction

Headed somewhat in the wrong direction

Definitely headed in the wrong direction

Comment

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2. Your view of the CO Wine Industry Development Board

4. Generally speaking, how would you rate your overall experience with the Colorado Wine Industry Development Board?

Excellent

Good

Fair

Poor

Comments

5. Listed below are a variety of programs, services, benefits, etc. that the CWI DB currently provides. For each, please indicate in the appropriate column how important each is to you, your winery and your business plan.

	Very Important	Somewhat Important	Not Very Important	Not at All Important	N/A
Carriers and other promo goods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Colorado Wine Festivals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Colorado Wine Trails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consulting Enologist	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Educational Opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government Relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In-State Public Relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (Please specify in Comments)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional/National PR	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism Promotion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Viticultural Research	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine Country Brochure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
www.coloradowine.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

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6. Now please indicate how well you feel the Wine Board's is doing in providing these same services or programs.

	Very Effective	Somewhat Effective	Not Very Effective	Not at All Effective	N/A
Carriers and other promo goods	jn	jn	jn	jn	jn
Colorado Wine Festivals	jn	jn	jn	jn	jn
Colorado Wine Trails	jn	jn	jn	jn	jn
Consulting Enologist	jn	jn	jn	jn	jn
Educational Opportunities	jn	jn	jn	jn	jn
Government Relations	jn	jn	jn	jn	jn
In-State Public Relations	jn	jn	jn	jn	jn
Regional/National PR	jn	jn	jn	jn	jn
Tourism Promotion	jn	jn	jn	jn	jn
Viticultural Research	jn	jn	jn	jn	jn
Wine Country Brochure	jn	jn	jn	jn	jn
www.coloradowine.com	jn	jn	jn	jn	jn

Comments

3. Your view of threats to the CO Wine Industry

7. Please list below the five issues that, in your opinion, will pose the greatest threat to or have the greatest impact on Colorado's wine industry in the near future.

Greatest threat	<input type="text"/>
Second greatest threat	<input type="text"/>
Third greatest threat	<input type="text"/>
Fourth greatest threat	<input type="text"/>
Fifth greatest threat	<input type="text"/>

8. For which of the threats you listed above would look to the CO Wine Board for assistance and leadership? And why?

4. Your thoughts on Wine Board communications

9. Thinking about communications by the CWI DB concerning programs, projects and industry matters, do you believe the CWI DB

Is doing an excellent job of communicating with industry members

Does a good job

Does a fair job

Is doing a poor job of communicating

Comments and suggestions

10. In general, by what means do you receive the most information from the CWI DB?

Other operators or vineyards and/or wineries

E-mails with Executive Director

Newsletter

CWI DB web site

CWI DB Board members

Through RMAVV communications or meetings

Telephone calls from Executive Director

Other (please specify)

11. How would you prefer to receive communications from the CWI DB?

By telephone

By e-mail

On www.coloradowine.com

By FAX

By regular mail

Other (please specify)

12. In your opinion, how important is it that the CWI DB produce and distribute a report annually detailing the finances and activities of the CWI DB?

Very important

Somewhat important

Not very important

Not at all important

Comments

5. CWI DB Leadership

13. Overall, how would you rate the job that CWI DB's leaders are doing in managing and guiding the organization?

Excellent

Good

Fair

Poor

Comments

14. How much do you think CO Wine Industry Development Board's members and leaders represent the interests of all members?

A great deal

Somewhat

Very little

Not at all

Comments

15. If you were chair of the CWI DB for just one day, what one thing would you change or do to improve CWI DB?

6. Stakeholder profile

16. How many years have you been involved in the wine industry?

Number of years

17. Is your business

- Primarily local (i.e., within the state)
- Regional (i.e., sales in Colorado and surrounding states)
- National

18. Where is your business primarily located?

(Winery location and not necessarily tasting room locations)

- | | | |
|---|--|---|
| <input type="checkbox"/> Grand Valley AVA | <input type="checkbox"/> Front Range outside Denver | <input type="checkbox"/> Montezuma County |
| <input type="checkbox"/> West Elks AVA | <input type="checkbox"/> Mesa County, outside the AVA | <input type="checkbox"/> Fremont County |
| <input type="checkbox"/> Denver Metro Area | <input type="checkbox"/> Delta County, outside the AVA | <input type="checkbox"/> Larimer County |
| <input type="checkbox"/> Other (please specify) | | |

19. Does your business consist of: (check all that apply)

- A Winery only with no on-site tasting room
- A Winery with an on-site tasting room
- Remote Tasting Room or Rooms, with no wine-making facilities
- A Vineyard
- Other (please specify)

7. Vineyards and Tasting Rooms

20. If you have vineyards planted, how many acres do you own or control in the following areas?

(If you don't have vineyards, please go to the next question.)

Grand Valley AVA	<input type="text"/>
West Elks AVA	<input type="text"/>
Denver Metro Area	<input type="text"/>
Front Range outside Denver	<input type="text"/>
Mesa County, outside the AVA	<input type="text"/>
Delta County, outside the AVA	<input type="text"/>
Montezuma County	<input type="text"/>
Freemont County	<input type="text"/>
Larimer County	<input type="text"/>
Other	<input type="text"/>

21. If your business is a permanent remote tasting room or you have remote tasting room license(s) associated with your winery, please list the number of remote tasting room licenses you have in each area.

Grand Valley AVA	<input type="text"/>
West Elks AVA	<input type="text"/>
Denver Metro Area	<input type="text"/>
Front Range outside Denver	<input type="text"/>
Mesa County, outside the AVA	<input type="text"/>
Delta County, outside the AVA	<input type="text"/>
Montezuma County	<input type="text"/>
Freemont County	<input type="text"/>
Larimer County	<input type="text"/>
Other	<input type="text"/>

22. In your tasting room, what items do you sell beside wine?
(Please check all that apply.)

- Packaged food
- Prepared food such as picnic or deli items to go
- Food to be consumed on the premises
- Wine accessories
- Non-wine related gifts
- Clothing
- Tourism souvenirs
- Winemaking or home brew supplies
- Other Colorado wineries' products
- Other (please specify)

23. Does your business also include a winery?

Yes

No

8. How much wine do you sell and to whom?

24. What is the production capacity of your winery?

- 200-1000 gallons annually
- 1000-2000 gallons annually
- 2000-5000 gallons annually
- 5000-10,000 gallons annually
- 10,000-20,000 gallons annually
- 20,000-50,000 gallons annually
- 50,000-100,000 gallons annually
- More than 100,000 gallons annually
- N/A

What percentage of your production capacity are you currently actually producing? (Please enter percentage as a whole number. Example: ACTUAL production is 4000 gallons with a 5000 gallon CAPACITY would be 80.)

25. According to your ideal business marketing strategy, and not necessarily the current reality of your sales, what percentage of your business would come from each of the following segments.

(Provide a rough percentage for each segment. Place a zero beside any segment that is not important to your ideal marketing strategy. The total must equal 100%)

- Non-wine sales: gifts, crafts, accessories, packaged food, prepared food
- On-site event sales and catering (weddings, meetings, etc.)
- Other
- Sales at Farmers Markets and similar outlets
- Sales at Liquor Store parking lot tastings
- Sales at wine festivals
- Sales directly to restaurants (on-premise licenses)
- Sales directly to retail liquor stores (off-premise licenses)
- Sales through a wholesaler
- Sales through special events for non-profits and charities
- Sales to Wine Club members
- Tasting room sales to locals
- Tasting room sales to tourists

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26. Does your winery currently sell to consumers in states outside Colorado?

If so, please list the states below.

- Yes, through the Internet (please list states below)
- Yes, through a wholesaler (please list states below)
- No, we don't sell out of state

In what other states do you sell your wine?

27. Does your winery currently sell any wine outside the USA?

If so, please indicate in which country or countries and how you sell there (on-line, importer, etc.).

No

Yes, in the following country or countries

28. If the CWI DB offered more export readiness services and devoted resources to developing foreign markets, would that encourage you to consider exporting?

Yes

No

Suggestions and comments

29. Ideally, five years from now and ten years from now how much increase in production and sales does your business plan project?

(Express your answer in a percentage of your current sales or production:

125% means a 25% increase over current levels

200% means twice as much as current sales.)

Five years from now

Ten years from now

30. From which of the market segments or sales strategies listed in question #25, 26 and 27 do you envision most of your increase in sales coming during the next five or ten years?

9. Colorado Grown

31. Do you use the phrase "Colorado Grown" to designate any wines you make from 100% Colorado grapes or produce?

Yes

No

Why or why not?

32. Do you buy any of the grapes or other produce used to make your wine from growers or sources outside Colorado?

Yes

No

10. Non-Colorado grapes and produce

33. Approximately what percentage of your annual wine production comes from grapes, produce, concentrates, etc. from outside Colorado?

Percentage of outside grapes or produce:

34. Why do you purchase grapes or produce from outside Colorado?
(Please check all that apply.)

- I am not able to get enough of a particular varietal to meet demand.
- The varietals I want to make don't grow well in Colorado.
- The quality of Colorado grapes and produce is too inconsistent.
- I don't like working with Colorado growers.
- I can make better wine if I blend Colorado grapes and produce with that from outside the state.
- The quality of grapes and produce is better outside Colorado.
- The management or franchiser of my business requires that I purchase from their business.
- Colorado grapes and produce are too expensive.
- The availability of Colorado grapes and produce is too inconsistent.
- Other (please specify)

11. Memberships and Final Comments

35. Are you a member of the Rocky Mountain Association of Vintners and Viticulturists?

Yes

No

Why or why not?

36. Are you a member of WineAmerica?

Yes

No

Why or why not?

37. Please make any final comments or share any additional thoughts with the CO Wine Industry Development Board regarding the industry, CWIDB programs or future plans.