

# 2025 Oregon Wine Industry Econ Impact Analysis Survey

Dear Oregon Vineyard Operator and/or Wine Producer: Welcome to the 2025 Oregon Wine Economic Impact Study survey. Our study estimates the Oregon wine industry's 2024 revenues, employment levels, vineyard management costs (owned or contracted), and winery costs. Such data help Oregon's wine industry demonstrate how broad and deep its economic benefits are as derived from vineyard and winery operations across the state economy. This study is used when advocating for our industry in the government and financial sectors. The survey should take about 20 minutes to complete. Having your summary financial information for 2024 (tax records or financial statements) handy is helpful; however, estimates you believe are close approximations to the actual outcomes from your memory are also very helpful.

**Privacy Statement:** This project is commissioned by the Oregon Wine Board (OWB) to be completed by Economic Forensics and Analytics, Inc. (EFA) in partnership with Full Glass Research (FGR). The information you provide is kept confidential and secure. No individual business' data will be used or shared with any party outside EFA and FGR. Furthermore, individuals or wineries will not be named in the final report. Individual business data are combined with all Oregon vineyards, wineries, and third-party sources to produce the Oregon Wine Industry Economic Impact Report for 2024. The survey requires no company or personal names. Respondents are identified in the raw data only by a random ID number. We want to thank you for taking the time, with a special heartfelt thank you to those who consistently support studies commissioned by the OWB. If you have any questions, please contact Robert Eyler, [eyler@econforensics.com](mailto:eyler@econforensics.com), or call 707-318-0348. Thanks for contributing your information!

Basic Information Do you represent a winery, vineyard, or vineyard management business?

- ☐ Winery Only
- ☐ Vineyard Only
- ☐ Vineyards and Winery
- ☐ Vineyard Management

## Winery Information

Basic Information In which Oregon County is your winery located? (If in more than one county, select primary county)

|                 |                 |
|-----------------|-----------------|
| Baker (1)       | Lake (19)       |
| Benton (2)      | Lane (20)       |
| Clackamas (3)   | Lincoln (21)    |
| Clatsop (4)     | Linn (22)       |
| Columbia (5)    | Malheur (23)    |
| Coos (6)        | Marion (24)     |
| Crook (7)       | Morrow (25)     |
| Curry (8)       | Multnomah (26)  |
| Deschutes (9)   | Polk (27)       |
| Douglas (10)    | Sherman (28)    |
| Gilliam (11)    | Tillamook (29)  |
| Grant (12)      | Umatilla (30)   |
| Harney (13)     | Union (31)      |
| Hood River (14) | Wallowa (32)    |
| Jackson (15)    | Wasco (33)      |
| Jefferson (16)  | Washington (34) |
| Josephine (17)  | Wheeler (35)    |
| Klamath (18)    | Yamhill (36)    |

**Price per case in 2024:** For cases (9L) your winery sold in 2024, what is your best estimate of the average **price** per case (9L) sold (to the nearest whole number) in each channel for your winery overall? For example, if \$250 per case (9L), enter 250. If you don't sell to a particular channel, please leave the entry blank.

|                                                                     |  |
|---------------------------------------------------------------------|--|
| Sold inside the tasting room (taken by customer, not shipped)       |  |
| Sales shipped direct-to-consumer (DTC), but not Wine Club           |  |
| For wine Club sales, shipped or picked up from winery               |  |
| Sold directly to retail or restaurants in Oregon                    |  |
| Sold to distributors for domestic US sales inside or outside Oregon |  |
| Sold internationally (bottled wine exported)                        |  |
| Sold in some other way than listed above                            |  |

**Wine Production and Sales Volume Estimates:** Please provide full-year 2024 data for your winery based on your latest available information or best estimates. Please use whole number only (for example, for 2,000,000 gallons or 200,000 cases sold, use 2000000 or 200000 respectively). These are winery operations only, not vineyards your business owns (see more below).

|                                                  | 2024 Data |
|--------------------------------------------------|-----------|
| Production Volume (9L Equivalents cases bottled) |           |
| Sales Volume (9L Equivalents cases sold)         |           |
| Total bulk wine produced (gallons)               |           |
| Bulk wine sold (gallons) outside Oregon          |           |

**Winery Revenue Estimates:** Please provide full-year 2024 data for your winery based on your latest available information or best estimates. Please use whole number only (for example, \$200,000 would be entered as 200000). These are winery operations only, not vineyards your business owns (see more below).

|                                                                                                                                                                               | 2024 Data |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| Revenue from wine sold in the tasting room (Dollars, taken by customer, not shipped)                                                                                          |           |
| Sales revenue for wine shipped direct to consumer (DTC), including via wine club, website, phone sales, etc. but not including take-away sales in the tasting room. (Dollars) |           |
| Total revenue from non-wine sales (events, lodging, weddings, etc.) in \$                                                                                                     |           |
|                                                                                                                                                                               |           |

**Winery Employment and Payroll Estimates:** Please provide full-year 2024 data for your winery based on your latest available information or best estimates. Please use whole number only (for example, \$200,000 would be entered as 200000). These are employees in winery operations and general administration only, not vineyard operations (see more below).

|                                                                                                                                       | 2024 Data |
|---------------------------------------------------------------------------------------------------------------------------------------|-----------|
| Employees (Headcount) for all workers not related to vineyard management or operations (winery and administration, but not vineyards) |           |
| Percentage (%) part-time employees from Headcount above                                                                               |           |
| Total payroll paid (wages and benefits) to workers (dollars)                                                                          |           |

**Winery Expenses Estimates:** Please provide full-year 2024 data for your winery based on your latest available information or best estimates. Please use whole number only (for example, \$200,000 would be entered as 200000). These are winery operations and general administration only, not vineyard operations (see more below).

|                                                                                                                      | 2024 Data |
|----------------------------------------------------------------------------------------------------------------------|-----------|
| Total operational expenses (Dollars) for winery operations and administration, including wages and benefits paid     |           |
| Marketing expenses specifically (for example, advertising, direct mail, events, social media & e-commerce) (Dollars) |           |
| Expenses paid for winery equipment, tanks, infrastructure (dollars)                                                  |           |
| Expenses paid to winery indirect services/suppliers (dollars)                                                        |           |

## Winery Information

For all wine sold in 2024 (nationwide or internationally), what percentage (%) of cases (9L) took place in each of the following channels? Please enter whole numbers, for example for 20% enter 20.

Sold in the tasting room in 2024 (customer buys and takes wine with them) : \_\_\_\_\_

Shipped direct to consumer (DTC), including through Wine Club in 2024 : \_\_\_\_\_

Sold directly to retail or restaurants in Oregon in 2024 : \_\_\_\_\_

Sold to wholesale/distributors in 2024 : \_\_\_\_\_

Sold internationally through distributors in 2024 : \_\_\_\_\_

Sold in some other way than the above channels in 2024 : \_\_\_\_\_

Total : \_\_\_\_\_

### **Optional (skip if you like, especially if your winery only sells DTC) On-Premise and Off-Premise**

**Channels:** Of your wine that is sold in **Oregon** (by you and/or your wholesaler), provide your best estimate of what percent (%) of your total sales is made through each channel. The estimates should sum to 100, please use a whole number (for 30% use 30).

On-premise (restaurant, hotel, resorts, bars etc.) in 2024 : \_\_\_\_\_

Off-premise to food stores, drugstores, mass market, club stores in 2024 : \_\_\_\_\_

Off-premise to liquor or wine stores in 2024 : \_\_\_\_\_

Total : \_\_\_\_\_

Approximately how many visitors came to your tasting room(s) in 2023 and 2024? If you don't track visitors, you may substitute with the number of individual tasting room customers (i.e. paid tasting fees or bought wine). Please use round numbers, use 10000 for 10,000 or 50 for 50%, for example.

|                         | Number of Visitors | Percent from Oregon |
|-------------------------|--------------------|---------------------|
| 2023 Visitors to Winery |                    |                     |
| 2024 Visitors to Winery |                    |                     |

## Vineyard Information

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Vineyard How was the vineyard owned and managed in 2024?

- ☐ Independent vineyard farmed by owners
- ☐ Winery-owned vineyard farmed by winery
- ☐ Vineyard farmed by vineyard-management company
- ☐ Other (please specify in text box below)
- 

Basic Information In which Oregon County is your vineyard(s) located? (If in more than one county, select primary county)

|                 |                 |
|-----------------|-----------------|
| Baker (1)       | Lake (19)       |
| Benton (2)      | Lane (20)       |
| Clackamas (3)   | Lincoln (21)    |
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| Jefferson (16)  | Washington (34) |
| Josephine (17)  | Wheeler (35)    |
| Klamath (18)    | Yamhill (36)    |

**Vineyard Information:** For your vineyard(s) in 2024, please answer the following questions. Please provide whole-number, estimated, full-year data for your vineyard or vineyard management business for 2024. For example, 1,000 acres would be entered as 1000. If you grow more than one variety of grapes in your vineyard, overall averages are ok. Please answer as precisely as you can from memory or your records.

|                                                      | 2024 |
|------------------------------------------------------|------|
| Total existing vineyard acres (Acres)                |      |
| New vineyard acres planted (Acres)                   |      |
| Number of acres removed from your existing vineyards |      |

**Harvest Information Estimates:** For your vineyard(s) in 2024, please answer the following questions. Please provide whole-number, estimated, full-year data for your vineyard or vineyard management business for 2024. For example, \$200,000 would be entered as 200000. Please answer as precisely as you can from memory or your records.

|                                             | 2024 |
|---------------------------------------------|------|
| Total vineyard acres harvested (Acres)      |      |
| Yield (tons/acre harvested)                 |      |
| Average Grape Price per Ton (all varieties) |      |
| Percent of harvest sold outside Oregon (%)  |      |

**Vineyard employment and Payroll Estimates:** For your vineyard(s) in 2024, please answer the following questions (if you have both a winery and vineyards, employees and wages/benefits here are vineyard only). Please provide whole-number, estimated, full-year data for your vineyard or vineyard management business for 2024. For example, \$200,000 would be entered as 200000. Please answer as precisely as you can from memory or your records.

|                                                                           | 2024 |
|---------------------------------------------------------------------------|------|
| Total employees (# of workers) in vineyard                                |      |
| Percentage of total vineyard employees that are part-time (%)             |      |
| Total payroll (wages and benefits) paid to all vineyard workers (Dollars) |      |

**Vineyard Expense Estimates:** For your vineyard(s) in 2024, please answer the following questions. Please provide whole-number, estimated, full-year data for your vineyard or vineyard management business for 2024. For example, \$200,000 would be entered as 200000. Please answer as precisely as you can from memory or your records.

|                                                                                                               | 2024 |
|---------------------------------------------------------------------------------------------------------------|------|
| Total operational expenses (Dollars) for vineyard management and operations including payroll paid to workers |      |
| Vineyard development and maintenance/equipment (Dollars)                                                      |      |

For your vineyard or the vineyards you managed **in 2024**, please estimate to the nearest dollar the following average costs **per acre**. If you did not plant any new acres in 2024, please leave the new vineyard cost per acre blank.

☐ Average cost of planting a new vineyard per acre (if you planted new vineyard) in 2024

\_\_\_\_\_

☐ Average cost of maintaining the acres currently planted per acre in 2024

\_\_\_\_\_

**For all, Charitable Contributions Estimates:** Please provide 2024 data for your winery based on your latest available information or best estimates. Please use whole number only (for example, \$200,000 would be entered as 200000). These are winery operations only, not vineyards your business owns (see more below).

|                                                                                                                                                                                                        | 2024 Data |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| Charitable Contributions, cash or equivalent: If you own both vineyards and winery, please provide the total for both your winery and vineyard (Dollars)                                               |           |
| Charitable Contributions Cases (9L), if any wine is donated or wine is poured for an event: If you own both vineyards and winery, please provide the total for both your winery and vineyard (Dollars) |           |

**Overall, what is your single biggest concern about the wine industry or your business in 2025?**

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2025 Outlook: Given general economic and industry uncertainty, please advise how your vineyard / winery is doing so far in 2025 on the following elements (better or worse?):

|                                                                             | Better/More<br>than 2024? | Worse/Less<br>than 2024? | About the<br>Same as 2024 | Not Sure Yet          | Not Applicable        |
|-----------------------------------------------------------------------------|---------------------------|--------------------------|---------------------------|-----------------------|-----------------------|
| Tasting Room<br>Visitation                                                  | <input type="radio"/>     | <input type="radio"/>    | <input type="radio"/>     | <input type="radio"/> | <input type="radio"/> |
| Tasting Room<br>Sales                                                       | <input type="radio"/>     | <input type="radio"/>    | <input type="radio"/>     | <input type="radio"/> | <input type="radio"/> |
| Wine Club<br>Memberships                                                    | <input type="radio"/>     | <input type="radio"/>    | <input type="radio"/>     | <input type="radio"/> | <input type="radio"/> |
| Pricing in<br>Wholesale or<br>Retail Tiers                                  | <input type="radio"/>     | <input type="radio"/>    | <input type="radio"/>     | <input type="radio"/> | <input type="radio"/> |
| Breadth of<br>Distribution (#<br>of on/off-<br>premise<br>accounts)         | <input type="radio"/>     | <input type="radio"/>    | <input type="radio"/>     | <input type="radio"/> | <input type="radio"/> |
| Anticipated<br>tons of grapes<br>harvested                                  | <input type="radio"/>     | <input type="radio"/>    | <input type="radio"/>     | <input type="radio"/> | <input type="radio"/> |
| Anticipated<br>tons grapes<br>crushed/wine<br>produced                      | <input type="radio"/>     | <input type="radio"/>    | <input type="radio"/>     | <input type="radio"/> | <input type="radio"/> |
| Capital<br>Spending<br>(equipment,<br>planting,<br>infrastructure,<br>etc.) | <input type="radio"/>     | <input type="radio"/>    | <input type="radio"/>     | <input type="radio"/> | <input type="radio"/> |

**Optional (not required):** Please let us know if you used estimates from memory or your financial/tax records (e.g. CRM, Point-of-Sale software, QuickBooks, etc.) to answer these questions.

- ☐ Memory
- ☐ Financial/Tax Records
- ☐ Mix of both methods

**Optional (not required):** If you are willing for us to contact you, if we need clarify or follow up any questions, please provide you contact information here. Your contact info will not be shared.

- ☐ Company Name \_\_\_\_\_
- ☐ Person Responding to Survey \_\_\_\_\_
- ☐ E-mail for Person Responding \_\_\_\_\_