



“ **Wine Opinions** ”

Missouri Wine Consumer Research Report

July 18th, 2023

INTRODUCTION

Under the direction of the Missouri Wine and Grape Board, Wine Opinions conducted a research project with the principal goal of understanding the awareness, trial, and perceptions of Missouri wines among residents of the state who are regular wine drinkers but who do not purchase Missouri wines.

The primary objectives of the study were as follows:

- Identify and demographically profile Missouri wine buyers and those who are Missouri residents and drink wine at least monthly but who do not buy Missouri wines
- Detail the wine purchase and usage behaviors of each group
- Establish the factors that are most influential to purchasing a new wine
- Rate the value of the types of information or graphic images found on wine labels
- Determine leading types of varietal wines purchased by respondents and their preferences for each on a scale from “very dry” to “very sweet”
- Determine the levels of awareness, trial, and purchase of Missouri wines and Missouri winery visitation
- Measure the degree of interest in trying Missouri wines and visiting Missouri wineries among those

without these experiences

- Determine the degrees of sweetness/dryness and styles of red and white wines of most interest to those who are not buyers of Missouri wines

Methodology

There were 1,079 qualified respondents to the consumer survey who were residents of Missouri or located in either the Kansas City or St. Louis metropolitan areas. All were those who drink wine (on average) at least monthly or more often. Confidence intervals for the total sample were $\pm 1.5\%$ to $\pm 2.5\%$.

Analysis

Factors used for comparative analysis of survey results include age, gender, and awareness or trial of Missouri wines. Missouri winery visitation and trial or purchase of Missouri wines were also analyzed and reported.

Note: Light tan shadings in tables call out row numbers of directional interest or statistical significance. Light green shadings call out column numbers of directional interest or statistical significance.

KEY TAKEAWAYS

- **Target Audience:** *The survey focused on Missouri residents (including those living in the St. Louis or Kansas City metropolitan areas) who drink wine monthly or more often but do not buy Missouri wines. In comparison to Missouri wine buyers, this group is somewhat younger (mean age of 40, vs. 44 for Missouri wine buyers). As a group, they are somewhat less frequent wine drinkers than Missouri wine buyers. The target audience also skews female (56%). They are well educated (79% have some college education, college degrees, or advanced degrees) and have a mean household income of \$80K. They regularly purchase 750ml wines across all price segments, especially wines selling for \$10 to \$14.99. A plurality (42%) of the target audience consider wine to be their favorite type of beverage alcohol.*
- **Style Preference:** *When asked to indicate on a scale of 0 – 10 their preferred level of sweetness in a new white or red wine they might purchase, target audience respondents chose sweetness levels just beyond the midpoint of the “very dry to very sweet” scale. Their sweetness preference for white wines was just a bit higher than for red wines, but both were on the “sweet” side of the scale.*
- **Purchase Influences:** *Among target audience respondents, knowing the grape variety, familiarity with the region of production, and having visited the winery were seen as most influential to their selection of a new wine to try. Awareness of the leading Missouri grape varieties among target audience respondents was low.*
- **Valued Information:** *Descriptions of the wine’s flavor and level of sweetness were rated by both the target audience and Missouri wine buyers as the most important pieces of information that could be found on a wine label.*

KEY TAKEAWAYS (continued)

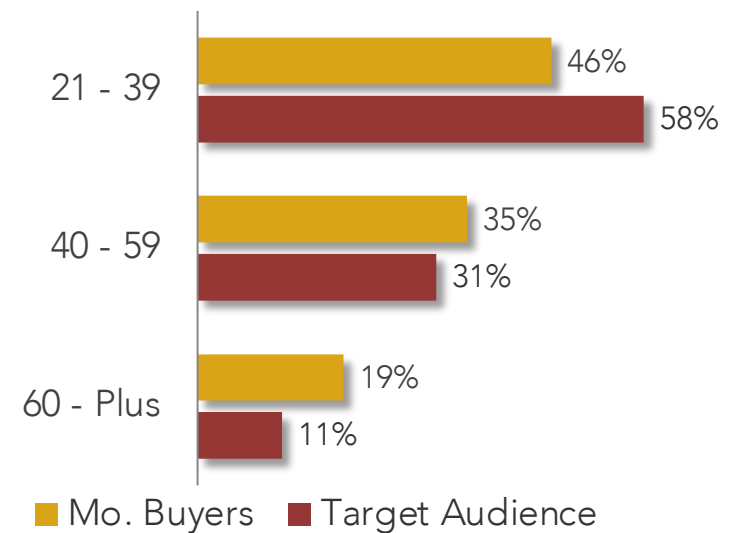
- **Trial of Missouri Wines:** Among target audience respondents, twice as many had “tried and liked” a Missouri wine than had “tried and did not like” Missouri wine.
- **Interest in Visitation and Tasting:** Of those who have not visited a Missouri winery and those who have not tasted Missouri wines, levels of interest in visitation and tasting were quite high, especially among those in ages 21-39.
- **Barriers to Purchase:** The top reasons given by those who have tried but not purchased Missouri wines are not knowing enough about the grape varieties; satisfaction with the wines they already know and like; and not seeing Missouri wines on the shelves of the stores where they buy wine.
- **Desired Attributes:** When asked to identify the attributes of a new white wine they would be interested in buying, “fresh fruit flavors” was most often mentioned by survey respondents. A wine that is “easy to drink on its own” was cited by more than half of respondents, as was “a delicate, subtle wine.” Attributes most desired in a new red wine were similar: nearly three-quarters of respondents described a red wine being “smooth and easy to drink” as their most-desired attribute. And just over half of respondents cited a red wine with distinctly fruity flavors or being a blend of red grapes.
- **Focus Group Findings:** Participants in the focus group confirmed the importance of knowing the grape variety as an influential purchase factor. However, their awareness of Missouri grape varieties was very low. As a group, they mainly favored wines with a little sweetness, and abundant fruit flavors. In discussing attributes they look for in a new red or white wine to try, they also echoed the survey finding that wines considered “smooth” and “easy to drink” were desirable. Their interest in trying Missouri wines and visiting a Missouri winery was uniformly high.

RESPONDENT PROFILES

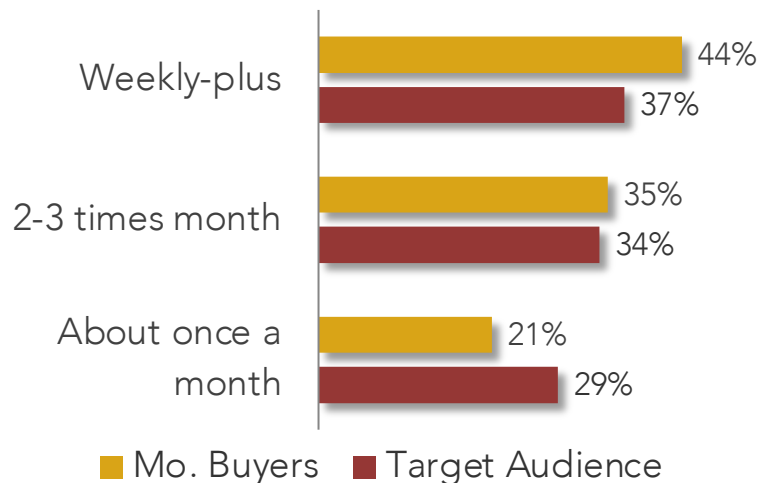
Primary analysis is focused on “target audience” respondents, defined as residents of Missouri (including the metro areas of St. Louis and Kansas City) who do not buy Missouri wines but who drink wine once a month or more often. This group skews much higher in the ages 21-39 segment and lower in the ages 60-plus segment than Missouri wine buyers (those who buy Missouri wines every 2-3 months or more often). Both Missouri wine buyers and the target audience skew significantly female.

Those who buy Missouri wines are slightly more frequent wine drinkers than the target audience.

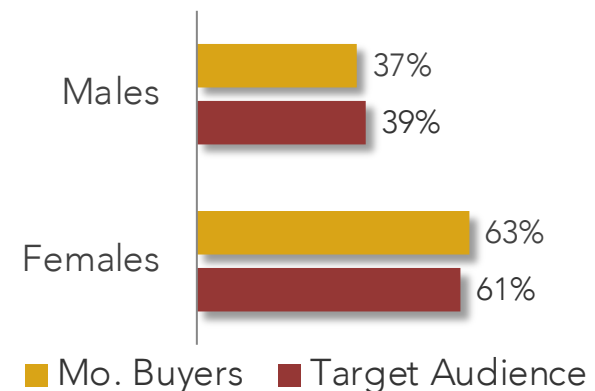
Age Segments



Wine Consumption Frequency



Gender

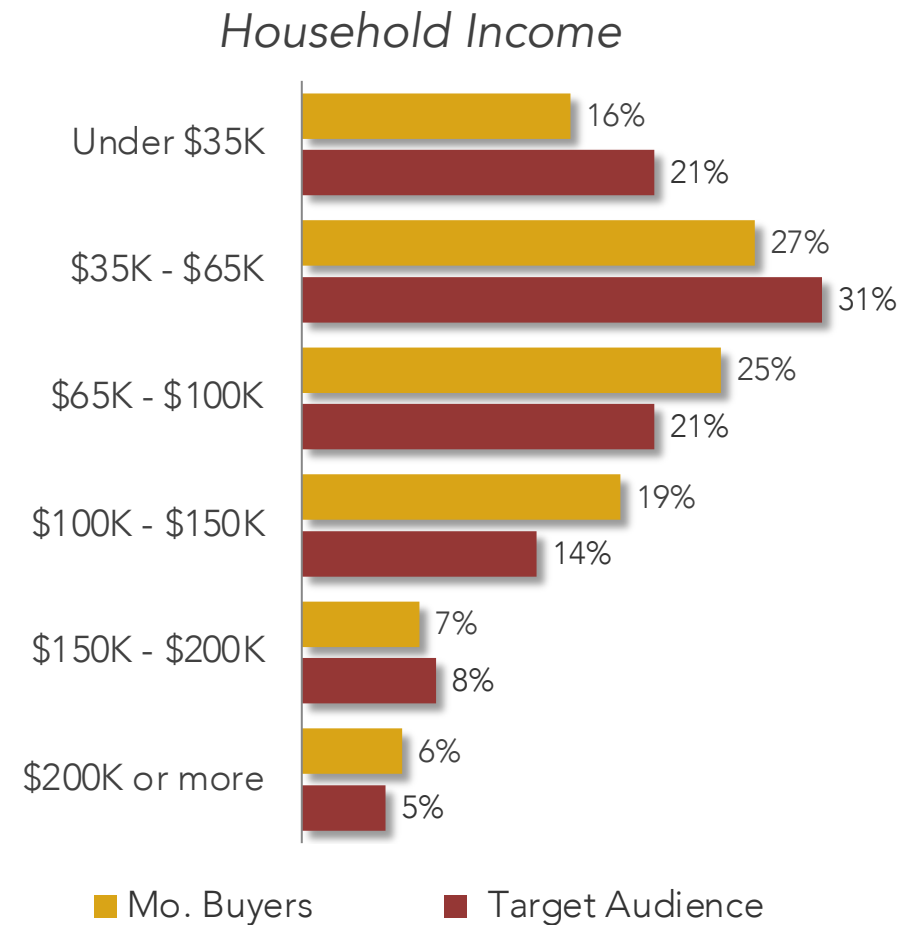


RESPONDENT PROFILES (continued)

The mean annual household income of respondents who buy Missouri wines every 2-3 months or more often is somewhat higher than that of the target audience (\$88.5K vs. \$80.1K). This is a reflection of the significantly higher percentage of target audience respondents in the ages 21-39 segment.

The mean annual household income of respondents in the St. Louis metropolitan area is highest among all geographic segments (\$92K, vs. \$84K for the Kansas City metropolitan area and \$70K for those living elsewhere in Missouri).

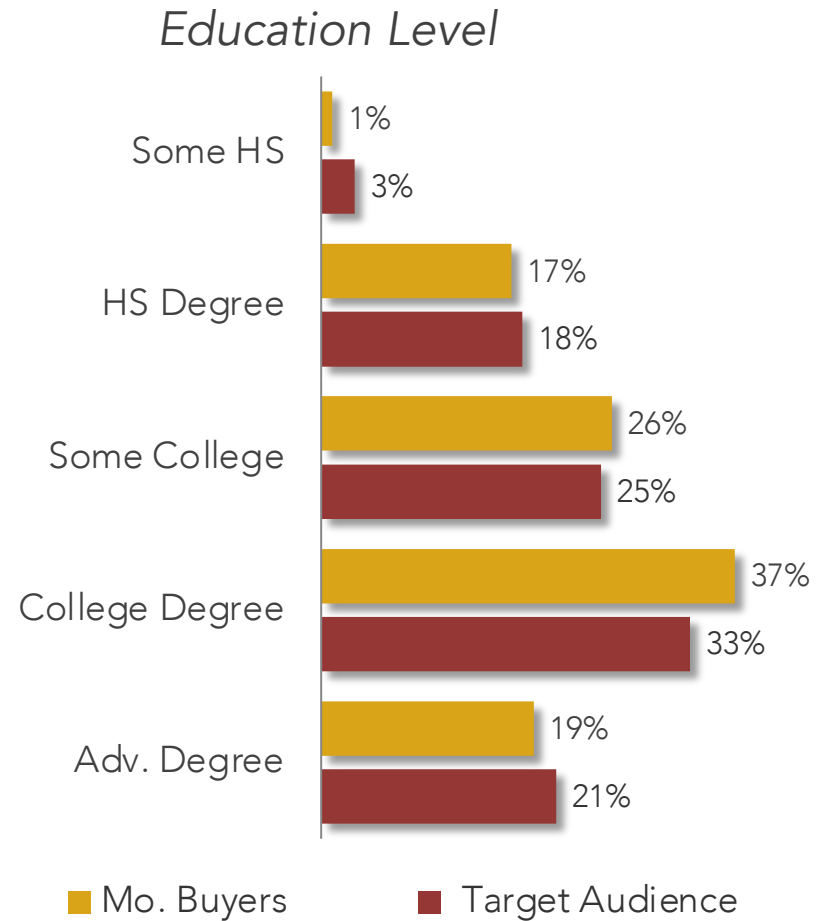
It is also of note that the mean household income of those who have visited a Missouri winery is somewhat higher than the household income of those who have not (\$87K vs. \$69K).



RESPONDENT PROFILES (continued)

The education levels of both Missouri wine buyers and the target audience are fairly high: 82% of respondents who at least occasionally buy Missouri wines have at least some college education (compared to 79% of those in the target audience). This education skew is typical among regular or frequent wine drinkers nationally.

As with income, higher education levels are seen among those living in the metropolitan areas, with 23% of respondents from the St. Louis metro area and 21% from the Kansas City area having attended graduate school or holding an advanced degree compared to 16% from all other regions of Missouri.

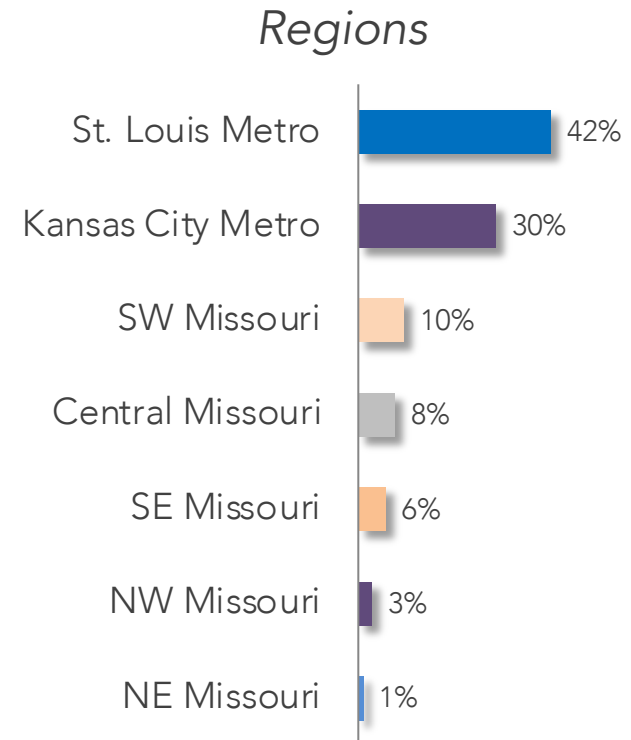


RESPONDENTS BY RESIDENCE

The two metropolitan areas accounted for nearly three-quarters of all survey respondents, which accords with the general “urban” skew to frequent or occasional wine consumption in the U.S.

A plurality of both Missouri wine buyers and target audience respondents were drawn from the St. Louis metropolitan area (43% of Missouri wine buyers, and 34% of target audience respondents). There were respondents in both groups represented in each of the geographic districts of Missouri.

Respondents from the Kansas City metropolitan area skewed significantly to the ages 21-39 group. In contrast, respondents from Southwest Missouri skewed significantly to the ages 60-plus respondent group.



750ml BOTTLE PURCHASES BY PRICE SEGMENT

Respondents were asked to state their frequency of purchase of 750ml wines by price segment.

Between one-quarter to one-half of respondents in total were monthly or more often buyers of wines across all price segments. Wines costing more than \$10 per 750ml bottle were purchased significantly more often by males than females.

Respondents under the age of sixty were shown to purchase wines in all price ranges significantly more often

than respondents in the 60-plus age group – especially wines in the \$15 - \$19.99 and \$20 or more price segments.

Those who buy Missouri wines and those who do not showed roughly equal frequency of purchase of wines in every price segment except \$10 - \$14.99, where purchase frequency skewed somewhat to those who buy Missouri wines every 2-3 months or more often.

Monthly or Weekly Purchases

<i>Price Range</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
Under \$6	37%	40%	35%	39%	36%	25%	36%	37%
\$6 - \$9.99	43%	51%	39%	44%	46%	33%	45%	42%
\$10 - \$14.99	49%	60%	43%	50%	50%	42%	53%	47%
\$15 - \$19.99	39%	47%	34%	42%	38%	26%	41%	37%
\$20 or more	28%	37%	24%	32%	29%	14%	27%	29%

PURCHASE INFLUENCES

Respondents were shown a list of factors that might influence their purchase decision when looking for a new wine to try. Using a 5-point scale, they were asked to rate the degree of influence each factor would have on their purchase choice. The table below shows the percentage of respondents rating “4” or “5” for each factor.

Recommendation from a wine-knowledgeable friend was the most influential factor. About half of respondents also gave ratings of “4” or “5” to the importance of the wine being from a region they know and like, made from a favorite grape variety, or made by a winery they have

visited or whose wines they have tasted.

Store staff recommendations or knowing that a wine pairs well with a meal that is being planned were factors of secondary importance to respondents in total.

Males were more likely than females to place a high value on several factors, but females were most likely to value the recommendations of a wine-knowledgeable friend.

The least influential factors were wine ratings on social media apps, awards or medals, and scores of 90-plus from wine critics.

Purchase Influences

<i>Factors</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
From a region I know and like	49%	53%	46%	48%	49%	52%	57%	44%
Score of 90-plus from a wine critic	35%	40%	33%	34%	39%	33%	42%	31%
Wine-savvy friend recommendation	61%	58%	63%	59%	64%	60%	69%	56%
A favorite grape variety	52%	57%	49%	48%	55%	61%	60%	48%
Store staff recommendation	41%	40%	42%	43%	41%	35%	44%	40%
Ratings on wine app like Vivino	33%	37%	30%	37%	34%	16%	34%	32%
Wine that pairs with a meal I’m planning	44%	48%	43%	46%	47%	35%	46%	43%
Wine has won awards or medals	38%	43%	35%	40%	38%	28%	40%	36%
I have visited the winery or tasted its wines	52%	50%	52%	49%	56%	52%	63%	45%

PURCHASE INFLUENCES (continued)

It was of note that a new wine being made from “a favorite grape variety” was a factor that increased in value with age. Respondents under 60 gave higher ratings to the value of store staff recommendation, awards or medals, and trying a new wine that pairs well with a meal that is planned.

Those who at least occasionally buy Missouri wines were more likely than target audience respondents to highly value the region of production and winery visitation (or having tasted the wine of a winery) and trying a new wine

made with “a favorite grape variety.”

Among target audience respondents, the factors deemed most influential to deciding on a new wine to try were recommendations from wine-knowledgeable friends, and the wine being a favorite grape variety. Secondary influences among target audience respondents were having visited the winery or tasted its wines, a wine region they know and like, or trying a new wine that “pairs with a meal I’m planning.”

Purchase Influences

<i>Factors</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
From a region I know and like	49%	53%	46%	48%	49%	52%	57%	44%
Score of 90+ from a wine critic	35%	40%	33%	34%	39%	33%	42%	31%
Wine-savvy friend recommendation	61%	58%	63%	59%	64%	60%	69%	56%
A favorite grape variety	52%	57%	49%	48%	55%	61%	60%	48%
Store staff recommendation	41%	40%	42%	43%	41%	35%	44%	40%
Ratings on wine app like Vivino	33%	37%	30%	37%	34%	16%	34%	32%
Wine that pairs with a meal I’m planning	44%	48%	43%	46%	47%	35%	46%	43%
Wine has won awards or medals	38%	43%	35%	40%	38%	28%	40%	36%
I have visited the winery or tasted its wines	52%	50%	52%	49%	56%	52%	63%	45%

LABEL INFORMATION OF PRIMARY IMPORTANCE

Respondents were shown a list of the types of information or graphic images that might be found on the front or back labels of wines. They were asked to check any of the listed factors they consider to be important to making a purchase decision.

Most often considered of importance were a description of the wine’s flavor; its level of sweetness/dryness; and the wine’s alcohol content. Each of these types of information were valued by significantly higher percentages of females than males. Male respondents

were somewhat more likely than females to value the region where the wine was produced and the vintage date of the wine.

Respondents over the age of 40 placed somewhat more importance than younger respondents on flavor and sweetness/dryness descriptions, the region of production, and vintage dating. They considered alcohol content information to be of slightly less value than respondents in the 21-39 age segment.

Label Information Importance

<i>Factors</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
A description of the wine’s flavor	67%	55%	75%	64%	69%	75%	75%	62%
Description of sweetness/dryness	57%	43%	66%	52%	58%	73%	64%	53%
Alcohol content of the wine	53%	49%	55%	55%	53%	42%	54%	53%
The region where the wine was produced	47%	50%	45%	43%	50%	56%	56%	42%
A vintage date	37%	44%	32%	34%	39%	40%	41%	34%
Recommended good pairings	32%	31%	32%	34%	30%	28%	38%	28%

LABEL INFORMATION OF SECONDARY IMPORTANCE

Among respondents in total, less than one in three considered any of the remaining types of information tested to be important to making a purchase decision.

Males were somewhat more likely than females to value the wine having organic or sustainable production certification; and winery contact information.

Younger respondents give significantly more value than

those in ages 60-plus to wine critic ratings or awards.

Target audience respondents gave somewhat less importance to every one of the types of information listed, which is an indication that – as a group – they are somewhat “less involved” wine drinkers than Missouri residents who buy Missouri wines.

Label Information Importance

<i>Factors</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
Whether or not to chill the wine	29%	27%	31%	30%	30%	28%	34%	27%
Listing of awards or critic ratings	28%	29%	27%	28%	31%	22%	34%	24%
Certification of organically-grown grapes	20%	24%	18%	22%	22%	9%	21%	20%
Certification of sustainable production	20%	23%	18%	23%	17%	13%	22%	19%
A depiction of the winery or vineyards	19%	20%	18%	19%	18%	21%	23%	16%
Winery contact information or links	16%	20%	14%	17%	15%	17%	20%	14%

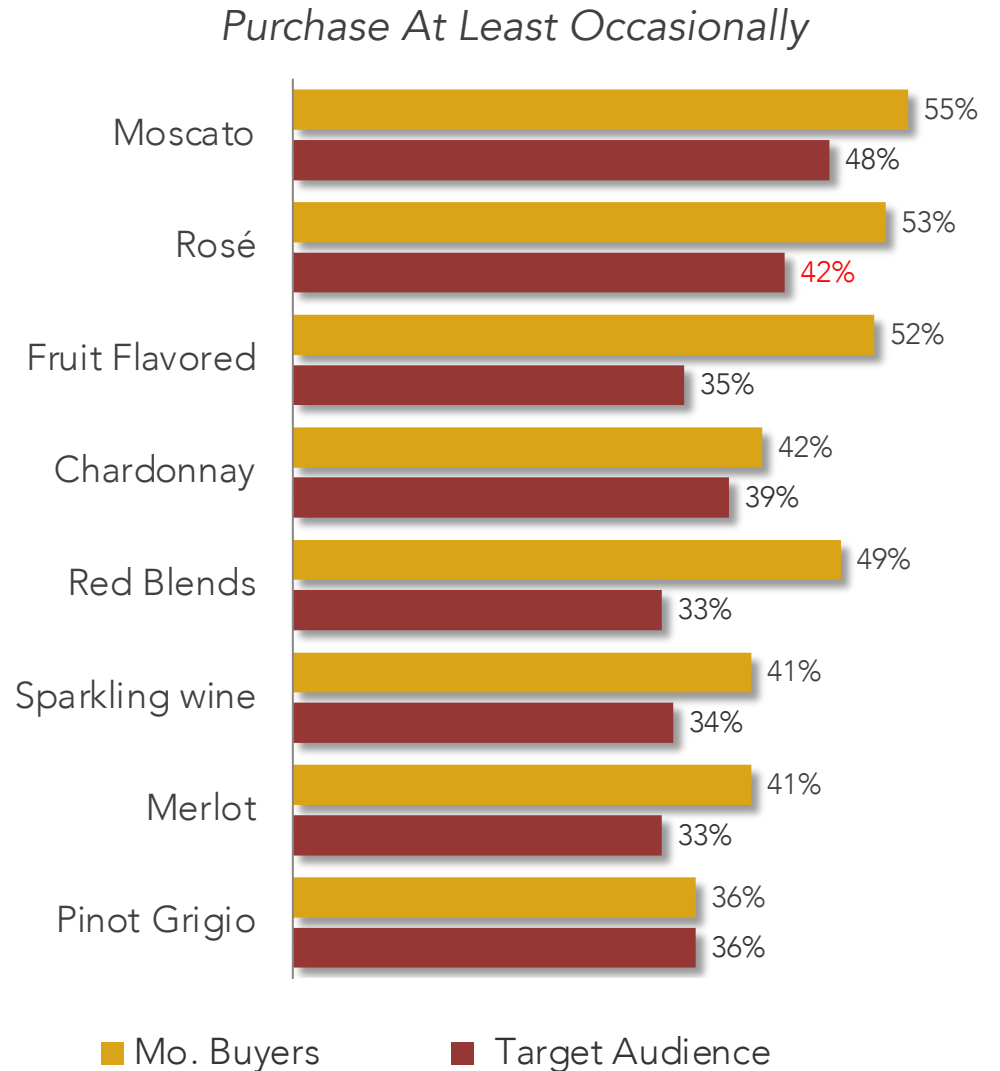
LEADING VARIETAL TYPES PURCHASED

Respondents were asked to check from a list of wine types any they purchase at least occasionally. Less than 1% checked “none.”

The chart at right shows the varietal types or styles of wines that were checked as being purchased “at least occasionally” by more than one-third of respondents in total.

Those who buy Missouri wines every 2-3 months or more often also are more frequent purchasers of every type or style of wine listed than target audience respondents, except for Pinot Grigio, which is purchased at least occasionally by 36% of each group. The greatest gap in purchase frequency between Missouri wine buyers and target audience buyers is in fruit-flavored or fruit wine and red blends, which are purchased by significantly higher percentages of Missouri wine buyers than target audience respondents. The degree of sweetness in both these types may be a contributing factor to frequency of purchase by Missouri wine buyers.

It is of note that purchase of Moscato, rosé, fruit-flavored or fruit wines, and sparkling wine all skew to younger respondents and to females.

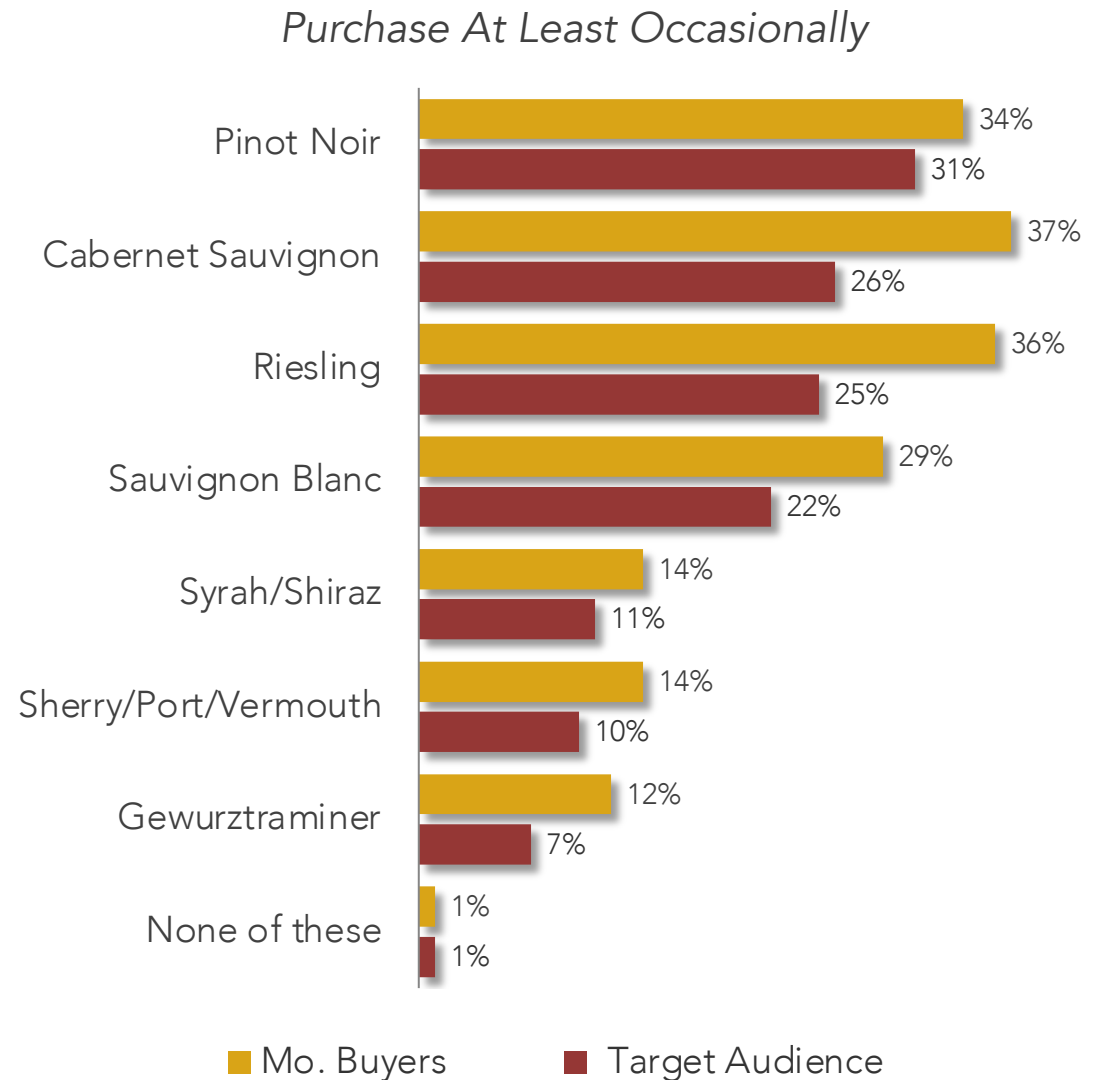


OTHER VARIETAL TYPES PURCHASED

The chart at right shows the varietal types or styles of wines that were checked as “at least occasionally” purchased by less than one-third of respondents in total.

As with the more frequently purchased varietal types, buyers of Missouri wines skew somewhat higher in purchase frequency of each varietal.

Cabernet Sauvignon purchase skews to males, while Riesling purchase skews to females. Riesling and Sauvignon Blanc purchases skew to those in the ages 40 and over segments.



DRYNESS/SWEETNESS PREFERENCES

Respondents who at least occasionally purchase each type or variety of wine were asked to indicate their dryness/sweetness preference for the types of wine they purchase. They rated their preferences for each type on a 4-point scale of “dry,” “medium dry,” “medium sweet,” and “sweet.” The preferences overall ranged from medium dry to medium sweet.

In most instances, respondents from the two metro areas skewed slightly more to the dry side of the scale, while those in other parts of Missouri skewed slightly more to the sweet side of the scale.

The chart at right shows the mean rating for all respondents who purchase each type of wine.

Tastes in Cabernet Sauvignon, Merlot, Syrah/Shiraz, and Pinot Noir ran to the drier side of all responses. For Cabernet Sauvignon, there were a slight skew to ages 21-39 and 40-59 preferring these wines to be not quite as dry as the preference among respondents age 60-plus. For Merlot, Sirah/Shiraz and Pinot Noir, the preferences of the ages 21-39 and 40-59 respondents were significantly less dry than the preferences of those in ages 60-plus.

The tastes of those who buy red blend wines ran somewhat less dry than for the other red wines. As with

the other red wines, younger buyers’ preferences were for slightly sweeter version of red blends.

Dry/Sweet Preference

Type	Dry/Sweet Mean Number
Cabernet Sauvignon	2.0
Syrah/Shiraz	2.1
Pinot Noir	2.2
Sauvignon Blanc	2.2
Merlot	2.3
Chardonnay	2.4
Pinot Grigio	2.5
Red Blends	2.6
Gewurztraminer	2.6
Sherry/Port/Vermouth	2.7
Riesling	2.9
Sparkling wine	3.0
Rosé	3.0
Moscato	3.2
Fruit-flavored or Fruit wines	3.5

DRYNESS/SWEETNESS PREFERENCES (continued)

Preferences for the still white wines ranged from medium dry to medium sweet, with Sauvignon Blanc and Chardonnay preferences leaning to the drier side of the scale, while tastes for Pinot Grigio, Gewurztraminer, Riesling and especially Moscato were somewhat sweeter.

As with red wines, the younger age segments showed preferences for slightly to moderately sweeter white and rosé wines.

In the case of Riesling, Moscato, and rosé, the preferences among females were for sweeter wines than those preferred by males.

For Sherry/Port/Vermouth the higher degree of sweetness preferred was driven by the ages 60-plus respondents. In contrast, preference for sweeter styles of sparkling wine were driven by respondents under age 60 and by females.

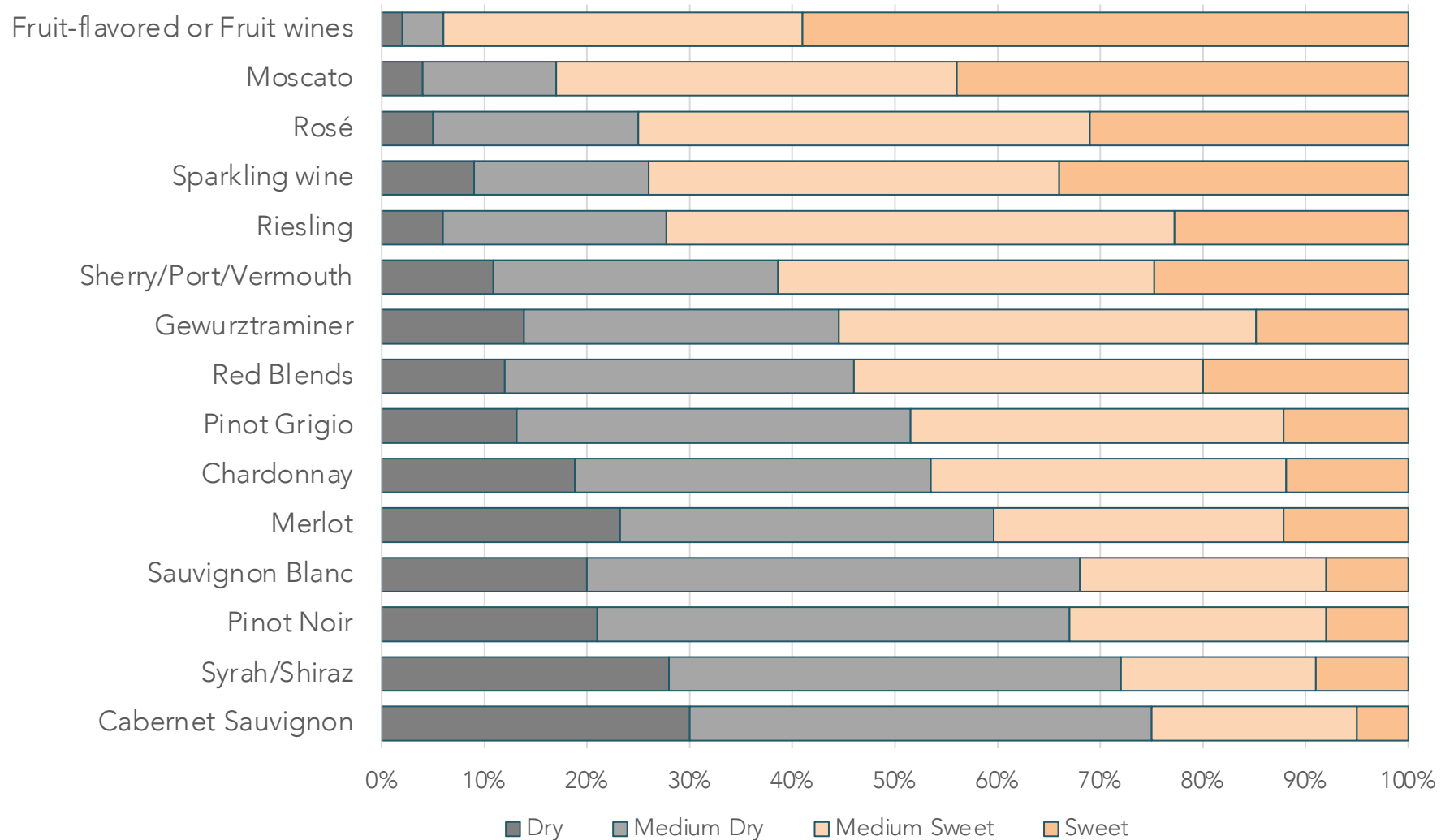
Those who at least occasionally buy fruit-flavored wines or fruit wines preferred a significantly sweeter style. The preference for sweetness in these wines skewed significantly to females and those in ages 21-39. It was of note that buyers of Missouri wines and target audiences respondents both preferred a mean sweetness level of 3.5 for these wines.

Dry/Sweet Preference

Type	Dry/Sweet Mean Number
Cabernet Sauvignon	2.0
Syrah/Shiraz	2.1
Pinot Noir	2.2
Sauvignon Blanc	2.2
Merlot	2.3
Chardonnay	2.4
Pinot Grigio	2.5
Red Blends	2.6
Gewurztraminer	2.6
Sherry/Port/Vermouth	2.7
Riesling	2.9
Sparkling wine	3.0
Rosé	3.0
Moscato	3.2
Fruit-flavored or Fruit wines	3.5

DRYNESS/SWEETNESS PREFERENCES (continued)

Preferred Sweetness Scale Results by Variety



VARIETAL AWARENESS – NEVER HEARD OF

Respondents were shown a list of leading varieties of Missouri wines together with a similar number of Vitis vinifera that are not well known (such as Albarino) which were included as a control, and exhibited awareness levels similar to the Missouri varietal types.

Respondents were asked to indicate their awareness, trial, opinion, and purchase (if any) of each grape variety. The results for the Missouri grape varieties are shown below and in the following series of pages for each response category.

Levels of awareness of Chambourcin, Vignoles, and Norton were fairly low (about 6 in 10 respondents were aware of these varietal types). Awareness levels of

Chardonel and Concord were considerable higher. For Chardonel, this may be due to its similarity in spelling and sound to Chardonnay. Concord may also be known to some as a familiar non-alcohol grape juice sold in supermarkets.

Awareness of the Missouri varietals was similar across age groups but somewhat lower for females in comparison to males.

Those who buy Missouri wines – understandably - had significantly higher awareness of each variety than target audience respondents – except for Concord. However, unawareness levels of Missouri wine varietal types among Missouri wine buyers was striking.

Never Heard Of

Varieties	Total	Male	Female	21 – 39	40 – 59	60 - plus	Buy Mo.	Target
Chambourcin	42%	36%	46%	41%	43%	47%	35%	47%
Vignoles	40%	35%	43%	40%	41%	38%	32%	45%
Norton	40%	36%	43%	40%	39%	44%	32%	45%
Chardonel	29%	24%	31%	29%	29%	25%	22%	32%
Concord	11%	9%	12%	14%	7%	6%	15%	17%

VARIETAL AWARENESS – HEARD OF, NOT TRIED

Most of those who have heard of Missouri varietal wines have also tried them (most likely because awareness occurred in situations where trial also occurred).

Lack of trial of Missouri wines among those who have heard of the varietal types was very low across all varieties tested. In fact, it is notable that relatively small percentages of those who have heard of the Missouri grape varieties have NOT tried them.

There were no significant variances among those who have not tried the listed varietal type by gender or age, and only slight variances between Missouri wine buyers and target audience respondents – except for Concord, which only 9% of Missouri wine buyers who had heard of the varietal had not tried it (compared to 17% of target audience respondents).

Heard Of, Not Tried

<i>Varieties</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
Chambourcin	13%	14%	13%	12%	15%	14%	12%	14%
Vignoles	13%	14%	13%	12%	14%	17%	11%	15%
Norton	13%	14%	13%	13%	14%	12%	12%	14%
Chardonel	15%	12%	17%	14%	16%	16%	13%	16%
Concord	14%	12%	15%	13%	16%	12%	9%	17%

INTEREST IN TRIAL BY VARIETY

Respondents who had not tried any one or more of the Missouri varietal wine types were asked to state whether or not they were interested in trying each type of wine they had checked as “Not tried.”

Levels of interest in trial were fairly even across all varietal types except Concord. However, interest in trial of

Concord skewed significantly to target audience respondents.

There were no significant variances in level of interest in trying the Missouri grape varietals among the age groups or genders, except that males were significantly more interested than females in trying Vignoles.

Not Tried But Interested

<i>Varieties</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
Chambourcin	14%	14%	13%	13%	15%	11%	14%	14%
Vignoles	12%	15%	10%	14%	9%	11%	14%	11%
Norton	14%	15%	13%	14%	14%	12%	14%	14%
Chardonel	14%	15%	13%	14%	12%	14%	14%	13%
Concord	10%	9%	11%	12%	9%	8%	6%	13%

TRIED, NOT LIKED

The percentage of respondents saying they had tried but not liked any of the Missouri wine varietal types was very low - less than 1 in 10. Concord, which was tried and not liked by 14% of respondents, but here again the familiarity of the name beyond wine may have been an issue.

Vignoles was the only varietal type with a gender skew, as nearly twice as many males stated trying and not liking that type of wine, compared to females. Trial and not

liking of the varietal types was consistent across the age segments, except for the Concord varietal, which was checked as “tried and did not like” by nearly three times as many respondents over the age of 60 in comparison to the younger age segments.

It was of note that similar percentages of Missouri wine buyers and those in the target audience had tried and rejected each of the listed varietal types.

Tried, Not Liked

<i>Varieties</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
Chambourcin	6%	9%	5%	7%	5%	5%	6%	7%
Vignoles	8%	11%	6%	9%	6%	4%	6%	9%
Norton	8%	8%	8%	8%	8%	11%	8%	8%
Chardonel	8%	11%	7%	8%	9%	8%	7%	9%
Concord	14%	15%	13%	10%	12%	29%	11%	15%

TRIED AND LIKED

Among respondents in total, more than three times as many had “tried and liked” a Missouri wine than had “tried and did not like” Missouri wine.

Concord and Chardonel were the varieties tried and liked by the highest percentage of respondents. Responses among males and females were quite similar, but males were somewhat more likely to have tried and liked Chardonel.

Trial and liking of the Missouri wine types was fairly evenly spread across the age groups, though liking of Vignoles skewed to respondents over the age of 40.

It was to be expected that higher percentages of Missouri wine buyers had tried and liked each varietal type, in comparison to target audience respondents. However, trial/liking of each varietal type among the target audience was considerable.

Tried and Liked

Varieties	Total	Male	Female	21 – 39	40 – 59	60 - plus	Buy Mo.	Target
Chambourcin	19%	19%	19%	21%	15%	20%	25%	15%
Vignoles	21%	21%	22%	19%	24%	24%	28%	18%
Norton	19%	20%	18%	19%	20%	16%	24%	16%
Chardonel	27%	30%	25%	26%	26%	34%	33%	23%
Concord	39%	41%	38%	38%	42%	38%	52%	32%

BUY OCCASIONALLY OR REGULARLY

Purchase of Missouri wines was expressed by similar percentages of respondents with the exception of the Concord variety, which skewed significantly higher – driven primarily by regular purchasers of Missouri wines.

Missouri wine purchases were slightly more prevalent among males and among respondents under age 60.

The relatively low percentages of Missouri wine buyers checking “occasional or regular” purchase by varietal type may be due to their more frequent purchase of blends, or wines with proprietary names where varietal type may not be a primary factor.

Buy Occasionally/Regularly

<i>Varieties</i>	<i>Total</i>	<i>Male</i>	<i>Female</i>	<i>21 – 39</i>	<i>40 – 59</i>	<i>60 - plus</i>	<i>Buy Mo.</i>	<i>Target</i>
Chambourcin	6%	8%	5%	6%	7%	3%	9%	4%*
Vignoles	6%	5%	6%	5%	7%	7%	10%	3%*
Norton	6%	7%	5%	7%	5%	6%	10%	3%*
Chardonel	8%	8%	7%	8%	9%	3%	10%	6%*
Concord	12%	14%	11%	13%	14%	8%	18%	9%*

*The small percentages of target audience respondents indicating purchase of Missouri wines were not considered “Missouri wine buyers” because their frequency of purchase of Missouri wines in most cases was below the “every 2-3 months or more often” threshold.

EXPERIENCES WITH MISSOURI WINE

A majority of respondents (61%) had visited a Missouri winery. The visitation group is made up of 72% of survey respondents who are Missouri wine buyers and 55% of respondents who do not buy Missouri wines. Visitors skew somewhat female and to the age groups over 40.

The respondents who indicated not having visited a Missouri winery skewed to the ages 21-39 group.

There were 16% of survey respondents who have tasted Missouri wines but not purchased them. This small group

skewed male but was evenly divided by age segment.

Only 7% of survey respondents had tasted but not liked them. These were mainly in the ages 60-plus segment.

A similarly small group of respondents (7%) had never tasted a Missouri wine.

It was notable that just over half of those who do not buy Missouri wines (or buy them less often than once every 2-3 months) have visited a Missouri winery.

Experiences With Missouri Wines

Statement	Total	Male	Female	21 – 39	40 – 59	60 - plus	Buy Mo.	Target
I have visited a Missouri winery	61%	58%	63%	57%	64%	71%	72%	55%
I buy wines made in Missouri every 2-3 months or more often	38%	36%	39%	32%	41%	51%	100%	N/A
I have not visited a Missouri winery	23%	24%	23%	27%	21%	16%	7%	33%
I have tasted but not bought Missouri wines	16%	20%	14%	17%	16%	15%	N/A	26%
I have tasted Missouri wines and don't care for them	7%	8%	6%	5%	7%	13%	N/A	11%
I have never tasted a wine from Missouri	7%	7%	6%	8%	5%	4%	N/A	10%

VISITATION AND TASTING INTEREST

There were 252 respondents who had not visited a Missouri winery. When asked to state their level of interest in visitation, 88% were either somewhat or very interested. Those with interest skewed heavily to the ages 21-39 and 40-59 segments. There was also a slight female skew in visitation interest.

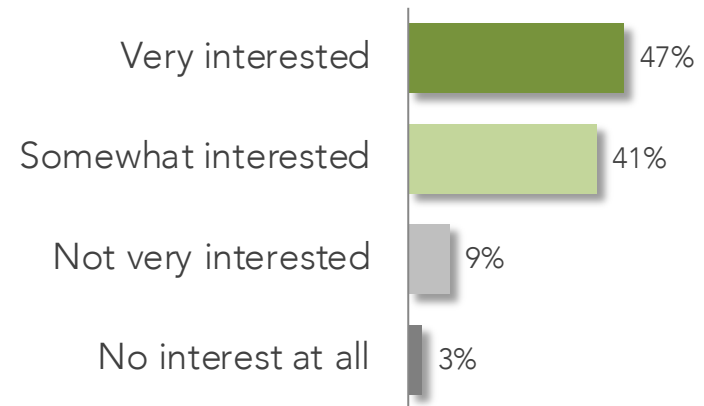
Among those with visitation interest, there was scant difference in their overall liking for wines on either the “dry” or “sweet” sides of the taste preference scale.

Of the very few who expressed little or no interest in visiting a Missouri winery and entered a comment (n=26) the most often reason cited was that they don’t drink much wine.

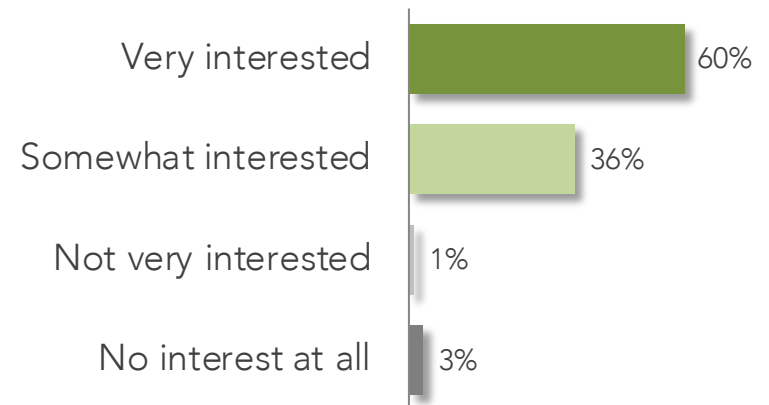
There were 70 respondents who indicated they had never tasted a wine from Missouri. These were mainly respondents in the ages 21-39 segment.

They were subsequently asked to state their level of interest in trying Missouri wines, and nearly all were either somewhat or very interested. Interest in tasting Missouri wines was equal between male and female respondents but most often was expressed by respondents under the age of 60.

Level of Interest in Visitation



Level of Interest in Tasting



WINERY VISITATION EXPERIENCES

There were 367 respondents who had visited a Missouri winery in the past, but who have not purchased a Missouri wine in the most recent 2-3 months. They were shown four statements describing their winery visitation and resulting purchase behaviors, and asked to check the statement that best described their experiences and current usage or attitude regarding Missouri wines.

Over one-third of these Missouri winery visitors bought a wine at the winery but have not purchased Missouri wines since. A nearly equal percentage indicated they had tried and like a wine at the winery but did not buy wine at the winery to take home.

One in four of these respondents had purchased a wine at the winery and sometimes buy Missouri wine in stores.

Only 5 percent of these Missouri wine visitors stated that they did not like any of the wines they tried at the winery. This small group was comprised mainly of those whose preferences are mostly for dry wines, and who buy wines costing \$15 or more on a monthly or more often basis.

Missouri Winery Experiences

<i>Statement</i>	<i>Percent</i>
I bought a wine (or wines) at the winery but haven't purchased any Missouri wines since	37%
I tried and liked a wine but did not buy wine at the winery to take home	32%
I bought a wine at the winery and sometimes buy this same wine (or other Missouri wines) in stores	26%
I did not like any of the wines I tried at the Missouri winery I visited	5%

TASTED BUT NOT PURCHASED MISSOURI WINES

There were 176 respondents who had tasted but not purchased Missouri wines. They were asked to check any of a series of statements that were reasons they do not buy Missouri wines.

Two factors accounted for much of the lack of purchase among those who have tasted but not purchased Missouri wines: Not knowing enough about them to know what they might like; and not often buying new wines because of satisfaction with the brands respondents know and like. These factors were cited across most of the demographic and behavioral categories of respondents.

Not having seen Missouri wines where they shop was expressed most often by those living outside of the two major metropolitan areas.

The small percentage who cited Missouri wines being too sweet for their taste skewed significantly to those who buy wines costing over \$15 monthly or more often.

Missouri Winery Experiences

<i>Statement</i>	<i>Percent</i>
Don't know enough about the varieties to know what I might like	35%
Always buy the wine brands I like and seldom look for new wines to try	30%
Haven't seen Missouri wines where I usually shop for wine	25%
Missouri wines are usually too sweet for my taste	19%
Just didn't like the taste of the Missouri wines I've tried	17%
I don't think Missouri wines offer good quality for the price	14%
I've never seen Missouri wines of a grape variety I like	10%
None of these statements apply	11%

TASTED BUT DID NOT LIKE MISSOURI WINES

There were 73 respondents who had tasted but did not care for Missouri wines. They were asked to offer brief commentary on what they did not like about the Missouri wines they had tried, and 65 did so.

The greatest number of comments (n=29) were that respondents found them to be too sweet. This opinion was evenly spread across age segments and gender, but almost all who found Missouri wines to be “too sweet” (24 of the 29 commentors) were those who had also stated a preference for dry wines.

Another 10 respondents indicated not liking the flavor of the Missouri wines they had tried, and 5 stated that the Missouri wines they had tried were too dry for their liking.

There were 4 respondents who indicated they just had a preference for wines of other regions, and another 4 who cited lack of body or “fullness” in the wines. Each of these respondents had also stated a preference for wines they are on the “dry” side of the scale.

ATTRIBUTES OF INTEREST IN A NEW WHITE WINE

Respondents were asked to imagine they are looking for a new white wine to try and identify from a list the attributes of the new wine of most interest to them. Degrees of interest in each attribute were on a 5-point scale, where “1” meant “no interest” and “5” meant “great interest.” The table at right summarizes the ratings of “4” and “5” for each attribute.

A white wine with a lot of “fresh fruit flavor” was of greatest interest to respondents, especially those under age 60. Interest in “fresh fruit flavor” also skewed to females, those who buy \$15-plus wines monthly or more often, and those whose tastes are on the sweeter side of the “sweetness/dryness” scale.

Liking of a “delicate, subtle” wine was cited evenly across age segments but skewed also to female respondents.

An “easy to drink on its own” wine was favored evenly across age and gender segments, and by those on both sides of the “sweetness/dryness” scale.

Those checking “wine with a smooth, buttery finish” were also evenly spread across age and gender segments, but skewed significantly to buyers of \$15-plus wines.

It was of note that those favoring “young and fresh” as an attribute skewed significantly to the “sweet” side of

the sweetness/dryness scale, while those favoring a “barrel aged” wine with a little oak flavor skewed significantly to those on the “dry” side of the scale.

After rating the attributes, respondents were then asked how sweet or dry they would want a new white wine to be. On the 10-point sweetness/dryness scale, the mean choice was 6.1 (on the sweet side of the mid-point). Female respondents skewed slightly to the sweeter side, as did respondents in ages 21-39, and those living outside the two metropolitan areas.

Ratings of “4” or “5”

Attribute	Percent
A wine with a lot of fresh fruit flavor	65%
A delicate, subtle wine	52%
The kind of wine that’s easy to drink on its own, or makes a good aperitif wine	55%
A wine with a smooth, buttery finish	43%
A wine that is young and fresh	45%
A white wine with a floral or spicy aroma	32%
A wine that has been barrel aged, with a little oak flavor	34%

ATTRIBUTES OF INTEREST IN A NEW RED WINE

Respondents were asked to imagine they are looking for a new red wine to try and identify from a list the attributes of the new wine of most interest to them. Degrees of interest in each attribute were on a 5-point scale, where “1” meant “no interest” and “5” meant “great interest.” The table at right summarizes the ratings of “4” and “5” for each attribute.

By a very wide margin, “A red wine that’s smooth and easy to drink” was the most favored attribute. There was a female skew to those citing this attribute (75%, vs. 69% of males) but favor was evenly spread across the age segments and between those on either side of the “sweetness/dryness” preference scale. Similarly, “A red wine blend of different grape varieties” was cited evenly across age segments and genders, as well as those on both sides of the “sweetness/dryness” preference scale.

Respondents in ages 40 and above were most interested in a “robust or full-bodied red wine,” as were males and those on the “dry” side of the “sweetness/dryness” scale and those who buy wines costing over \$15 on a monthly or more often basis.

Cited as a favorable attribute least often was a red wine with “aromas and flavors that are spicy or herbal.” This attribute was favored most often by those over age 40

and males, as well as those on the “dry” side of the “sweetness/dryness” scale.

The attribute of “a lighter, more delicate red wine” was cited significantly more often by females (52%, vs. 42% of males). It was also favored by those on the sweeter side of the “sweetness/dryness” scale and those who buy \$15-plus wines monthly or more often.

Asked how sweet or dry they would want the new red wine to be, the mean choice was 5.9 (slightly drier than for the white wine).

Ratings of “4” or “5”

Attribute	Percent
Red wine that’s smooth and easy to drink	72%
Is a blend of different grape varieties	54%
Has aromas and flavors that are spicy or herbal	32%
A lighter, more delicate wine	48%
A wine that has been barrel aged, with some oak flavor	37%
Wine with a distinctly fruity flavor	55%
Robust or “full-bodied” red wine	48%

PREFERRED SWEETNESS/DRYNESS LEVELS

Respondents were asked to state a “sweetness/dryness” preference for new white and red wines using a 10-point scale ranging from “very dry” to “very sweet.” The charts at right show the number of respondents selecting each point on the scale.

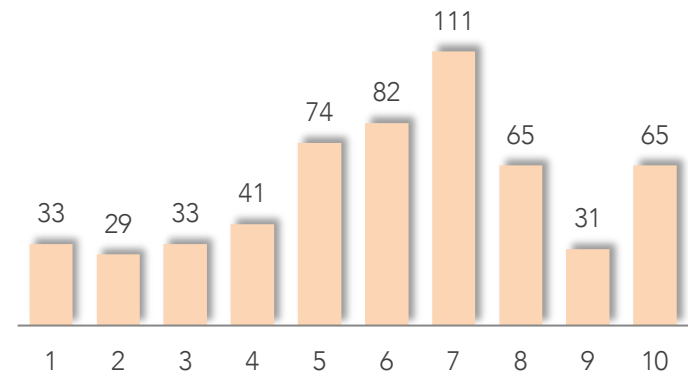
Most response chose the middle ranges of 4-7 for white wines and 3-8 for red wines.

While white wine preferences peaked at “7,” twice as many checked “10” than “1.” Red wine preferences followed a similar pattern, with most in the middle range of 3-8. Red wine preference peaked with 96 respondents selecting “5,” but as with white wines, there were twice as many checking “10” than “1.”

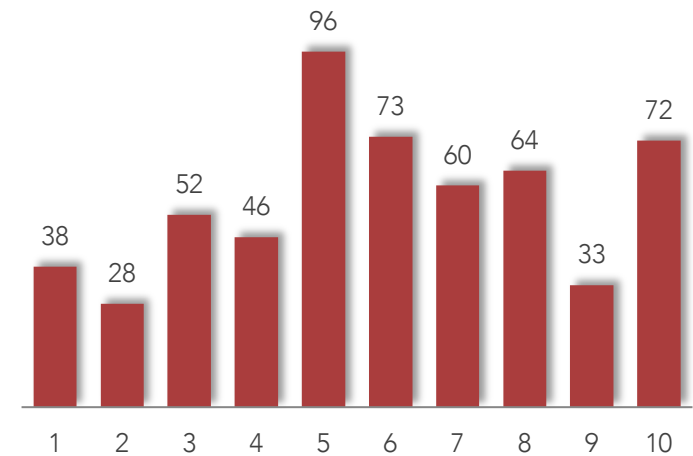
It was of interest that the preferred “sweetness/dryness” range selections for red and white wines were within 3 points for the vast majority of respondents.

There was also a significant correlation between those selecting the “dry” side as their preference and those who had answered “Tasted Missouri wines and did not care for them” in response to the question on personal experience with Missouri wines.

Frequency Distribution – Ideal White Wine



Frequency Distribution – Ideal Red Wine



Focus Group Summary

FOCUS GROUP PARTICIPANTS

Name	Age	M/F	Loc.	Drinks wine	Education	Income	Missouri Wine Experience	Interests
<i>Diane K.</i>	52	F	KC	Weekly+	College degree	\$65K - \$100K	Not visited, Tasted not bought	Very interested in visiting
<i>Emma W.</i>	24	F	St. L	Weekly+	Advanced degree	\$35K - \$65K	Not visited, Tasted not bought	Very interested in visiting
<i>David R.</i>	40	M	KC	2-3 x Month	College degree	\$65K - \$100K	Not visited	Very interested in visiting
<i>Jeff I.</i>	38	M	St. L	Weekly+	Advanced degree	\$35K - \$65K	Have visited, Bought at winery but not since	N/A
<i>Holli C.</i>	33	F	KC	1 x Month	Some college	\$35K - \$65K	Not visited, Never tasted	Very interested in visiting and tasting
<i>Shawndrea S.</i>	38	F	St. L	Weekly+	Some college	\$35K - \$65K	Not visited, Never tasted	Somewhat interested in visiting & tasting

FOCUS GROUP SUMMARY

Moderator: I just want to go around and have everyone introduce themselves. Your first name, where you live, maybe what you do. Then I would like you to tell us about the last glass of wine you had. What was it? Where were you? Was it a special occasion?

Two-thirds of the group mentioned Moscato as their most recent glass of wine or as a go to favorite.

Emma and Diana's most recent glasses of wine were consumed at a winery. Emma's was at a winery in Oregon while Diane enjoyed a glass of wine at Cooper's Hawk.

Moderator: What type of grape varieties do you like, types, colors of wine that you most often buy, where do they tend to be produced?

Sweet quickly became an over-arching theme. David was unfamiliar with different varieties, but he did know he liked wine that was sweet.

Holli was in agreement and likes sweet wines along with fruity flavors.

Jeff likes dry red wines. "I'm more of a red dry, or at least semi-dry like Pinots, and all that fun stuff. I like the Josh brand actually a lot. That's one that I gravitate to because it's affordable, but it's still good. I'm Italian, so I like a lot of the Italian wines. Even while I'll tend to do

dry, there's a lot of semi-sweets, and things that I'll have occasionally. I like a good Lambrusco."

Shawndrea tends to gravitate towards Moscato but recently discovered a red wine she liked from Mogen David.

Like Holli and David, Diane also likes fruitier and sweet wines. She frequently likes to go wine tasting with her girlfriends at Cooper's Hawk and is a member of their wine club.

Emma gravitates more towards drier wines. "I usually like the drier whites or the drier reds. Usually, for red, I go for a Merlot or a blend. Usually, I drink red wines, I pair it with dinner. If it's a girl's night and wine is the purpose, then it's usually like a bubbly or a rosé."

None of the participants seemed to find specific locations as a driving factor in what they consume.

FOCUS GROUP SUMMARY (continued)

Moderator: Now I would like everyone to think about their most favorite wine they've had. Then I'm going to go around, and I want you to tell me what that wine is, and then just give me two or three words that describe it.

Jeff described a Ca' De' Medici Lambrusco as “light but not too sweet.” David and Shawndrea both enjoyed Moscato d'Asti, and commented on its sweetness.

Emma liked Justin's “Isosceles” wine because it's “super smooth. It wasn't too bitter, and it went down easily.”

Diane found a bubbly sangria to be “sweet, but not super-sweet, and the flavor mixture is just fantastic.”

Barefoot Apple Moscato was a recent favorite of Holli's because of its sweetness.

Moderator: When you are looking for a new white or rosé wine to try, what are you looking for in terms of flavor or style?

Fruit, florals, and bubbles were some common themes of what participants looked for in white or rosé wines.

Diane, Jeff, and Shawndrea all agreed that they like bubbles.

Emma gravitates towards more floral flavors while Holli and Diane were not fans of florals. Diane thought florals

were “too perfumy.”

Fruiter flavors were brought up by Shawndrea, Holli, and Emma. Emma specifically called out melon flavors.

Moderator: What kinds of flavors or style in a red wine would make you most interested in trying that wine?

The participants look for a variety of different qualities in red wines.

Jeff continued to mention dry red wines, “I think it's dry, where I can just sip it throughout the night. I guess you could say, like a Merlot or things like that. It's not going to be something that I'm going to gulp down. I'm just going to relax, wind down and just enjoy it for a while.”

David was in agreement and liked ‘something smooth.’ “Like I said, not looking to just drink it all down, something you can sip on.”

Emma and Shawndrea both enjoy red wines with notes of blackberries. Diane mentioned darker fruits but likes, “more earthy, spicy flavors.”

Emma mentioned that she did not like tobacco or chocolate notes as they are “too rich and deep” for her.

Holli doesn't drink much red wine.

FOCUS GROUP SUMMARY (continued)

Moderator: In the survey you took, you were asked at the time to review a list of factors that might influence your choice of a new wine to try. I have a little poll that's basically the same question but I'm going to have you answer this again.

None of the participants found “a score over 90 points from a wine critic or publication” or “ratings from other wine drinkers on an app or website such as Vivino or

CellarTracker” to be influential when making a purchase.

The most common influencing factors were “the grape variety of the wine is among your favorites” and a “recommendation from a wine-knowledgeable family member or friend.” Shawndrea explained that if one of her friends told her she should try something, she usually does.

Statement	Agreement
The wine is from a region that produces other wines you already know and like	<i>Diane, Emma, Jeff</i>
A score of over 90 points from a wine critic or publication	N/A
Recommendation from a wine-knowledgeable family member or friend	<i>Diane, Holli, Emma, Shawndrea, Jeff</i>
The grape variety of the wine is among your favorites	<i>Diane, Holli, Shanwdrea, David, Jeff</i>
Recommendation from the retail store staff	<i>Diane, Shawndrea, David, Jeff</i>
Ratings from other wine drinkers on an app or website such as Vivino or CellarTracker	N/A
It's the kind of wine that matches a meal I'm planning	<i>Emma, Jeff</i>
The wine has won awards or medals	<i>Emma</i>
I have visited the winery or have tasted its other wines	<i>Emma, Shawndrea, Jeff</i>

FOCUS GROUP SUMMARY (continued)

Two-thirds of the participants found “recommendations from the retail store staff” to be influential. David likes talking to the staff about whether the product moves or just sits on the shelf.

Half of the participants cited “I have visited the winery or have tasted its other wines” as an influential factor. Shawndrea mentioned how she likes to “buy something from a brand that I like.”

Moderator: For those who have not visited a Missouri winery, what is your interest in visiting one?

Holli, Shawndrea, David, and Emma were the participants who had not visited a Missouri winery. All four stated an interest in visiting a Missouri winery.

Emma recently moved to Missouri and until she had moved, she had no idea there were Missouri wineries, but she is aware that there is one about 25 minutes away from where she lives. She has visited wineries in other states such as Oregon and California and those visits have influenced her subsequent purchases.

Holli is very interested in visiting a Missouri winery but “just haven't gotten around to it.” She is aware of some wineries in the area, and it's on her list to do one day.

David seemed to have a slight interest but doesn't have a lot of time to go for a visit and is unaware of where the nearest Missouri winery is located.

Shawndrea also wasn't sure where the nearest Missouri winery was, but is interested in going to one.

Moderator: We're going to shift to Jeff and Diane who have visited Missouri wineries. What was your experience? Where did you go?

Diane frequently likes to visit Missouri wineries for ladies' getaways. “We always take the train down to Herman and just spend the weekend and it's just a lot of fun” she said. She is a fan of the trolley in Herman. She and her friends will frequently purchase a couple of cases and split them up and take them home. They have a book club and they tend to enjoy the wines when they meet. She also has gifted Missouri wines for Christmas.

FOCUS GROUP SUMMARY (continued)

Jeff has also enjoyed visiting multiple wineries in Herman. He specifically mentioned Augusta as one they frequent. He seemed to thoroughly enjoy the whole experience. “It's nice because - again - you've got different wineries that you can hit as you travel down the road. It's just really nice, it's all open, a lot of these wineries have these big open sitting spaces with music playing, you have the ability to have some lunch there at different ones as well and different tastings and that's what makes it a lot of fun.”

Jeff has purchased Missouri wines from the winery but has not purchased those same wines from the store. “Actually no. Only because of the fact that a lot of the other wines that we have, it's just convenient to even hop to a Target and grab it. When you go to Augusta or something like that, it's just an experience. It's more of, okay, I'll take one home.”

Moderator: For those who have never tasted or don't know if they've tasted, what is your level of interest in trying Missouri Wines?

Holli, David, Shawndrea, and Emma were all interested in trying Missouri wines. Emma seemed the most keen on potentially trying Missouri wines from the store to see how they compared to other regions. David would be

open to either trying a Missouri wine at the winery or purchasing it elsewhere to try.

Holli and Shawndrea seemed most interested in trying Missouri wines at a Missouri winery. Shawndrea elaborated, “for me, I think I am more wanting to go to the winery. Feel like I would taste any wine, so I don't think it necessarily has to do with the area, but it's nice to have those things close to you. I would definitely prefer to go to the winery and do the wine tastings.”

Moderator: Have you seen Missouri wines on the shelf of where you shop for wine?

The overall consensus was that the majority of participants either haven't seen Missouri wines in store or haven't noticed if they were there. Jeff would like to think he's seen them but isn't completely sure. Diane was the only one who had noticed Missouri wines in some fine wine shops in Pleasant Hill.

Moderator: Do you tend to buy wines that you know or do you tend to pick something new and try something new?

Jeff and David like to stick with what they know. Holli, Emma, Diane, and Shawndrea mix it up and sometimes go with what they know, sometimes try something new.

FOCUS GROUP SUMMARY (continued)

Moderator: I've got one more poll little question. Let's see. Here are some different Missouri wine varietals. I'd like you to check the ones either you're aware of and/or tried. (Chambourcin, Vignoles, Norton, Vidal Blanc, Chardonel, Concord, Catawba), Seyval Blanc)

Awareness was low for a majority of the varietals with two respondents not being aware of any of them.

Jeff was aware of Concord. "I had it at the winery. I like the reds, but this one was obviously sweeter. It was good, but again, as more of a "dry" guy, that was it for me."

Diane was aware of Vignoles, Chardonel, Catawba, and Seyval Blanc and has tried some of them. "I have tried the Vignoles and that one's dry and I'm not crazy about dry wines, but I tried it. Then I've tried the Concord and that's right up my alley. It's a little sweet, but not horribly sweet. The Catawba, I've tried that one as well. I really enjoyed that one. It just had really good flavor."

Shawndrea and Emma both knew of Chardonel and Concord but neither knew much about them.

David and Holli were unfamiliar with all of the varietals.

Moderator: What would drive you to go visit a Missouri Winery or go back to one? What would kind of be that

"kick in the butt" to just be like, "Yes, I'm going."

Answers ranged from special occasions, the right timing, an event, or an invitation.

Jeff and David both commented on the importance of nice weather to get them to go.

Diane goes frequently and will be going back.

Moderator: Has anyone seen any advertising or social media posts from Missouri Wineries, wine stores regarding Missouri wines, or anything like that?

Holli was the only participant to have recalled seeing Facebook ads for some of the wineries doing haunted events around Halloween.

Moderator: What would get you to purchase a Missouri wine in the store?

Holli, Shawndrea, and Emma emphasized needing to know it was a local wine. Shawndrea went on to say that if she found it, tried it, and liked it, she would likely purchase it again.

David would like to try one just to be able to say he's tried Missouri wine.

Appendix

SURVEY QUESTIONNAIRE

1. What is your age? *Drop-down list of exact ages starting with “Under 21” and ending with “70 and over.” (Under 21 disqualifies)*

2. What is your gender?

Male

Female

Prefer not to answer

3. In what part of Missouri (or in which Missouri metropolitan area) do you live? Please check the area listed below that most closely describes where you reside. *(Multiple choice)*

St. Louis metropolitan area (in either Missouri or Illinois)

Kansas City metropolitan area (in either Missouri or Kansas)

Northeast Missouri (including Kirksville, Macon, Hannibal)

Northwest Missouri (including St. Joseph, Maryville, Chillicothe)

Central Missouri (including Columbia, Jefferson City, Rolla, Lake of the Ozarks)

Southeast Missouri (including Cape Girardeau, Poplar Bluff, West Plains)

Southwest Missouri (including Joplin, Springfield, Lebanon)

SURVEY QUESTIONNAIRE (continued)

4. On average, how often do you drink beer, wine, or spirits? Please indicate a consumption frequency for each.

Once a week or more often	2 - 3 times a month	About once a month	Once every 2 - 3 months	Less often or never
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Beer (including hard seltzer such as White Claw or Truly; or flavored malt beverages such as Twisted Tea, Mike's Hard Lemonade, etc.)

Wine (including sparkling wines, fruit wines, or fortified wines such as Sherry or Port) *Note: Drinking wine "once every 2 - 3 times month," "less often," or "never" disqualifies*

Spirits (including "ready to drink" cocktails)

For Q5, each respondent sees as answer rows the types of beverage alcohol they checked in Q4 with a consumption frequency of "Once every 2 - 3 months" or more often. A final row choice is "No preference."

5. Please check the type of beverage alcohol you consider to be your favorite. If you don't have a favorite, you may choose that answer from the bottom of the list. *(Multiple choice)*

Each row is a beverage type checked in Q4 as "Once every 2 - 3 months" or more often

6. How often, on average, do you buy 750ml (standard size) bottles of wine in the price ranges listed below?

SURVEY QUESTIONNAIRE (continued)

7. When you are looking for a new wine to buy, what degree of influence on your choice do each of the factors listed below have? On the 5-point scale, "1" means "no influence at all," and "5" means "Very influential."

1 – No influence at all	2	3	4	5 – Very influential
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The wine is from a region that produces other wines you already know and like

A score of over 90 points from a wine critic or publication

Recommendation from a wine-knowledgeable family member or friend

The grape variety of the wine is among your favorites

Recommendation from the retail store staff

Ratings from other wine drinkers on an app or website such as Vivino or CellarTracker

It's the kind of wine that matches a meal I'm planning

The wine has won awards or medals

I have visited the winery or have tasted its other wines

(Factors rotate)

SURVEY QUESTIONNAIRE (continued)

8. Please check any types of information or graphic images listed below that might be found on the front or back labels of wine that you consider to be important in deciding whether or not to buy that wine.

A depiction of the winery or its vineyards

The alcohol content of the wine

A vintage date

The region where the wine was produced

Recommended food pairings

A description of the wine's flavor

Winery contact information or links

Listing of awards the wine has won or ratings from wine critics

Whether or not to serve the wine chilled

Certification of using organically grown grapes

Certification of sustainable production

Description of the wine's sweetness/dryness

(Rows rotate)

SURVEY QUESTIONNAIRE (continued)

9. From the list below, please check the wine types or varieties you purchase at least occasionally. If you don't occasionally buy any of these, please check "None" from the bottom of the list. *(Checkboxes)*

Chardonnay

Pinot Grigio

Moscato

Riesling

Gewurztraminer

Sauvignon Blanc

Rosé

Cabernet Sauvignon

Sparkling wine

Merlot

Pinot Noir

Syrah/Shiraz

Red Blends

Sherry, Port, or Vermouth

Fruit-flavored wines or fruit wines

None of these

SURVEY QUESTIONNAIRE (continued)

10. Thinking of the wines you most often purchase, please check the degree of sweetness/dryness you prefer in each type listed below.

Dry	Medium Dry	Medium Sweet	Sweet
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Each varietal type or category checking in Q9 is shown as a row.

11. What your knowledge, experience or interest in wines made from the grape varieties listed below? Please check a description that applies to each variety. *(Matrix of multiple-choice rows)*

Never heard of	Heard of, not tried	Not tried but Interested in trying	Tried and did not like	Tried and liked	Buy occasionally or regularly
----------------	---------------------	------------------------------------	------------------------	-----------------	-------------------------------

- Albarino
- Chambourcin
- Gruner Veltliner
- Vignoles
- Norton
- Mencia
- Chardonel
- Concord

(Rows rotate)

SURVEY QUESTIONNAIRE (continued)

12. Please check any or all of the statements below that describe your experience with wines made in Missouri. *(Checkboxes)*

I have not visited a Missouri winery

I have visited a Missouri winery

I have tasted a wine or wines from Missouri but have not purchased any

I have never tasted a wine from Missouri

I have tasted Missouri wines and don't care for them

I buy wines made in Missouri every 2-3 months or more often *(Skip to Q24)*

At this point, those who checked "have not visited a Missouri winery" in Q12 are shown Q13.

13. What is your level of interest, if any, in visiting a Missouri winery in the next 12 months? *(Multiple choice).*

Very interested

Somewhat interested

Not very interested

No interest at all

At this point, those who checked "Not very interested" or "No interest at all" to "visiting a Missouri winery in the next 12 months" in Q13 are shown Q14.

14. Please offer a few words on the reason you have little or no interest visiting a Missouri winery. *(Open-ended comment box)*

SURVEY QUESTIONNAIRE (continued)

At this point, those who checked "have never tasted a wine from Missouri" in Q12 are shown Q15.

15. What is your level of interest, if any, in tasting Missouri wines? *(Multiple choice)*

- Very interested
- Somewhat interested
- Not very interested
- No interest at all

At this point, those who checked "Not very interested" or "No interest at all" to "Tasting Missouri wines" in Q15 are shown Q16.

16. Please offer a few words on the reason you have little or no interest tasting Missouri wines. *(Open-ended comment box)*

At this point, those who checked "I have visited a Missouri winery" in Q12 are shown Q17.

17. Thinking of the Missouri winery (or wineries) you have visited, please check the one statement below that best applies to your experience. *(Multiple choice)*

- I did not like any of the wines I tried
- I tried and liked a wine, but did not buy wine at the winery to take home
- I bought a wine (or wines) at the winery but I haven't purchased any other Missouri wines since then
- I bought a wine at the winery and sometimes buy this same wine (or other Missouri wines) in stores*

**Note: those who check the last row skip to Q24*

SURVEY QUESTIONNAIRE (continued)

At this point, those who checked "have tasted but not purchased" Missouri wines in Q12 are shown Q18.

18. You indicated having tasted but not purchased a Missouri wine. Please check any of the statements below that are reasons for not having purchased a Missouri wine. You may check as many statements as apply, or "None" from the bottom of the list. *(Checkboxes)*

- I haven't seen Missouri wines where I usually shop for wine
- I almost always buy a wine brand (or brands) I like and seldom look for new wines to try
- I don't think Missouri wines offer good quality for the price
- Missouri wines are usually too sweet for my taste
- I don't know enough about Missouri grape varieties or wines to know what I might like
- I've never seen Missouri wines of a grape variety that I like
- I just didn't like the taste of the Missouri wine or wines I have tried
- None of these statements apply

(Rows rotate except for the last row)

At this point, those who checked "I have tasted Missouri wines and don't care for them" in Q12 are shown Q19.

19. You indicated that you have tried Missouri wines and do not care for them. In the comment box below, please offer a few words in explanation of what you did not like about the Missouri wines you have tried. *(Open-ended comment box)*

SURVEY QUESTIONNAIRE (continued)

20. If you were looking for a new white wine to try, what kind of a wine would interest you most? Please check the degree to which each attribute would be of interest to you in a new white wine you might purchase. On the 5-point scale, "1" means "No interest" and "5" means "Great interest." If you are not sure, or would not be interested in trying a new white wine, please choose that answer from the bottom of the list.

1 – No Interest	2	3	4	5 – Great interest
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A wine with a lot of fresh fruit flavor

A delicate, subtle white wine

The kind of wine that's easy to drink on its own, or makes a good "aperitif" wine

A wine with a smooth, buttery texture

A wine that is young and fresh

An white wine with a floral or spicy aroma

A wine that has been barrel aged, with a little oak flavor

(Rows rotate, except for the last row)

At this point, those who checked "No interest" for every row in Q20 skip to Q22.

21. Thinking of the white wine you described in the question above, how sweet or dry would you want that wine to be?

Horizontal slider scale from "Very Dry" (0) to "Very Sweet" (10)

SURVEY QUESTIONNAIRE (continued)

22. If you were looking for a new red wine to try, what kind of a wine would interest you most? Please check the degree to which each attribute would be of interest to you in a new white wine you might purchase. On the 5-point scale, "1" means "No interest" and "5" means "Great interest." If you are not sure, or would not be interested in trying a new red wine, please choose that answer from the bottom of the list. *(Checkboxes)*

1 – No Interest	2	3	4	5 – Great interest
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- A red wine that is a blend of different grape varieties
 - A robust and "full-bodied" red wine
 - Red wine that has aromas and flavors that are spicy or herbal
 - A lighter, more delicate red wine
 - A wine with a distinctly fruity flavor
 - A wine that has been barrel aged, with some oak flavor
 - Red wine that is smooth and easy to drink
- (Rows rotate, except for the last row)*

At this point, those who checked "No interest" for every row in Q22 skip to Q24.

23. Thinking of the red wine you described in the question above, how sweet or dry would you want that wine to be?

Horizontal slider scale from "Very Dry" (0) to "Very Sweet" (10)

SURVEY QUESTIONNAIRE (continued)

24. Please check a range listed below that includes the annual income of your household (persons living in your home). You may also check the last row if you prefer not to answer this question. *(Multiple choice)*

Under \$35K
\$35K - \$65K
\$65K - \$100K
\$100K - \$150K
\$150K - \$200K
\$200K or more
Prefer not to say

25. What is the highest level of education that you have completed? You may also check the last row if you prefer not to answer this question. *(Multiple choice)*

Some high school
High school degree
Some college
College degree
Graduate school or advanced degree
Prefer not to say



“ **Wine Opinions** ”

P.O. BOX 231 • SARATOGA SPRINGS, NY 12866 • (707) 815-9463
INFO@WINEOPINIONS.COM • WWW.WINEOPINIONS.COM