

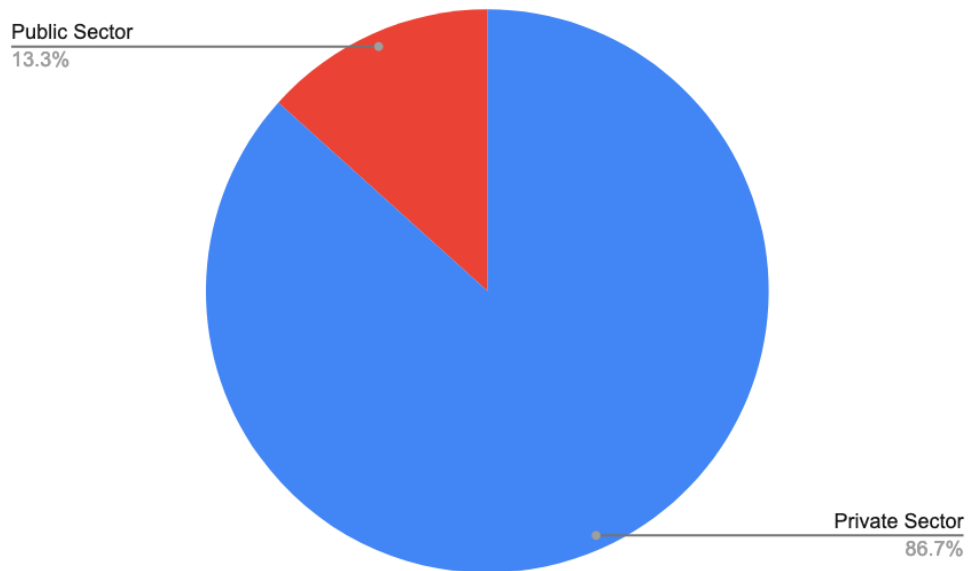


COVID-19 Wine Trade Association Survey

WineAmerica, the national association of American wineries, is conducting a series of on-line surveys of wineries and trade associations to assess the impact of the Covid-19 crisis on the American wine industry. This is valuable information to have when working with members of Congress and the Administration on potential initiatives to mitigate the negative effects. This survey was completed by 30 members of WineAmerica's State and Regional Associations Advisory Council to assess the impact on both their organizations and their perceptions of impact on the wineries they represent. Respondents are listed at the end, and we thank them for their participation. Questions about the survey should be directed to WineAmerica President Jim Trezise (jimtrezise@wineamerica.org).

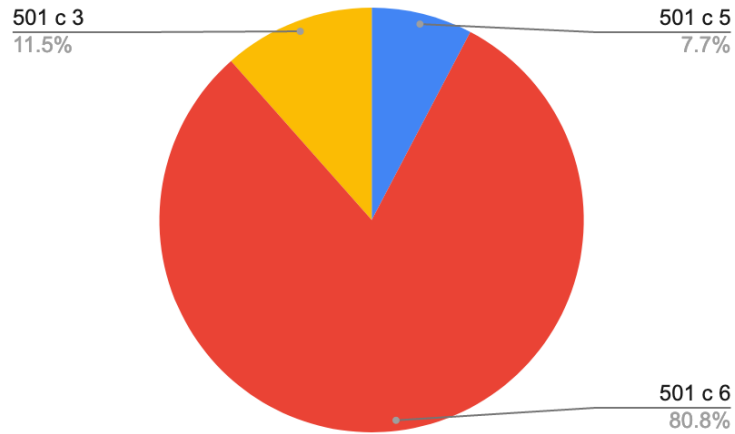
Respondent Information

1. Organization Governance



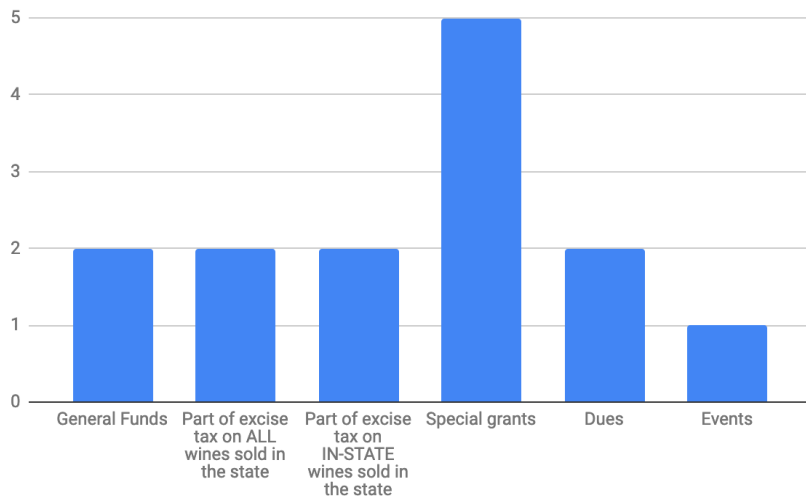
Public Sector	Private Sector
4	26

2. For private organizations, what type of organization are you?

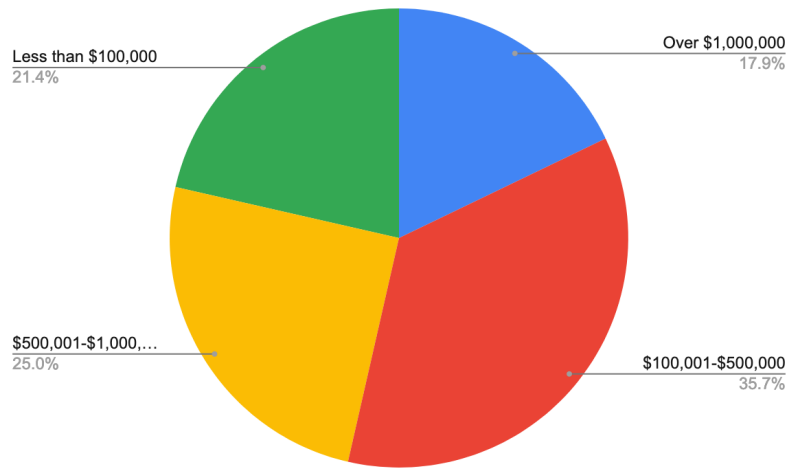


501 c 3	501 c 5	501 c 6
3	2	21

3. For Public Organizations: How do you derive your funding?

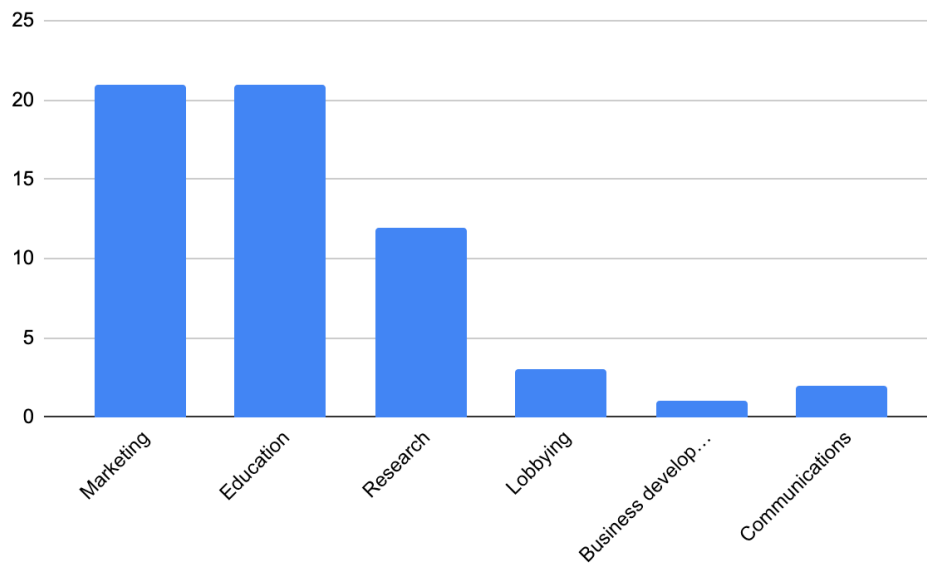


4. What is your total budget?



<\$100,000	\$100,000 - \$500,000	\$500,000-\$1,000,000	>\$1,000,000
5	11	7	5

5. What programs/functions does your association normally undertake?



Marketing	Education	Research	Lobbying	Business development	Communications
21	21	12	3	1	2

6. How many employees (full-time equivalent) does your association normally have?

Mean	Median	Minimum	Maximum
4.81	2	.1	50

Covid-19 Impact on Associations

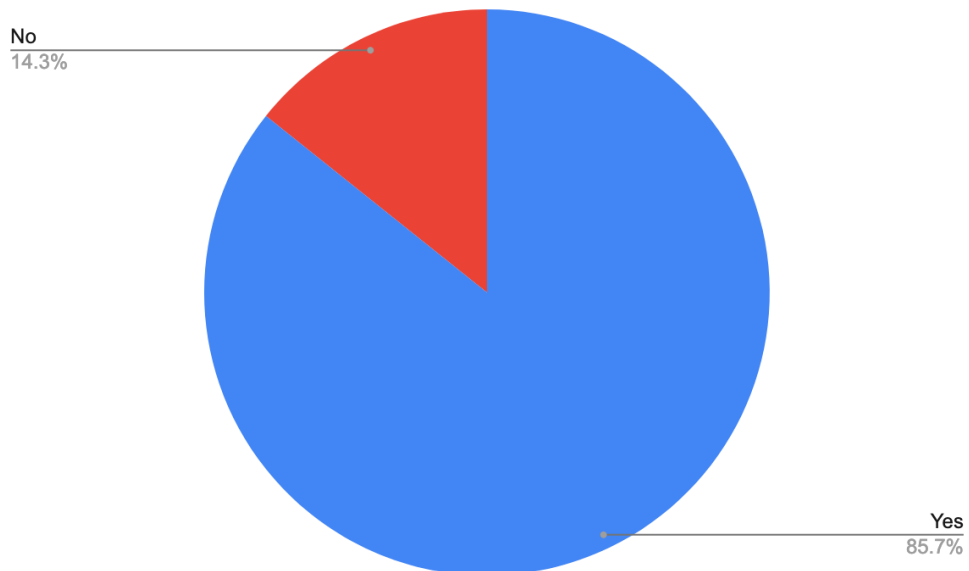
1. Since the crisis began, have you had to reduce employees? If yes, how many? If not, please enter 0.

Only 4 of the 30 associations have had to reduce employees.

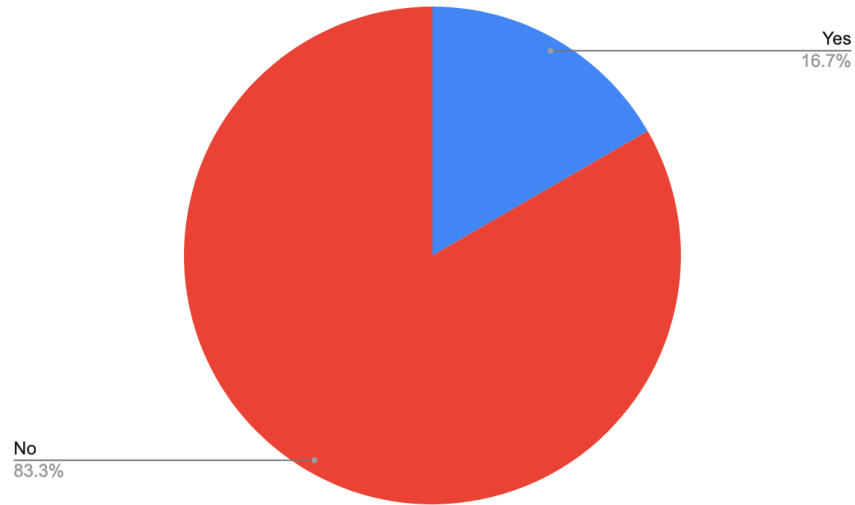
Of those who have had to reduce employees:

Mean	Median	Minimum	Maximum
2.25	2	1	3

2. If you reduced employees, do you hope and expect to hire them back when things return to normal?



3. Have you applied for a federal grant or loan to help your association through this crisis?



4. Have you lost, or do you expect to lose, members due to the crisis? If yes, what percent? If not, please enter 0.

15/30 (50%) of the respondents indicated they would lose members. Of those, these are their percentage loss estimates.

Mean	Median	Minimum	Maximum
19%	17.5%	5%	50%

5. Percentage of expected association REVENUE that will be lost due to the pandemic.

13/30 (43.3%) of the respondents indicated they would lose members. Of those, this is how many corresponded with their projected loss in revenue.

0-10%	11-20%	21-30%	31-40%	41-50%	51-60%	61-70%	71-80%
1	5	1	2	1	1	1	1

6. Have you had to reduce or eliminate certain functions? Check all that apply.

21 respondents reported having to reduce or eliminate certain functions. Of those, this is a specific breakdown of each type of function and how many organizations have had to scale them back.

Marketing	Events	Education	Lobbying	Research
14	7	8	3	5

7. For organizations that receive some degree of public funding: Do you think your funding sources will decline? If so, by how much?

Of the 9 publicly funded respondents, 5 reported expectations of decreased funding.

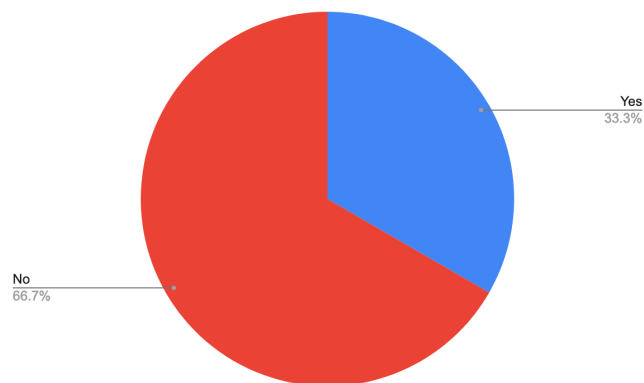
Percentage losses of all 9:

Mean	Median	Minimum	Maximum
12.3%	1%	0%	60%

Percentage losses of only the 5 that reported expectations of decreased funding:

Mean	Median	Minimum	Maximum
22.2%	20%	1%	60%

8. All organizations: Do you fear that your association may not survive this crisis?



Yes, I fear that my organization may not survive.	No, I feel that my organization will survive.
10	20

Impact on Wineries

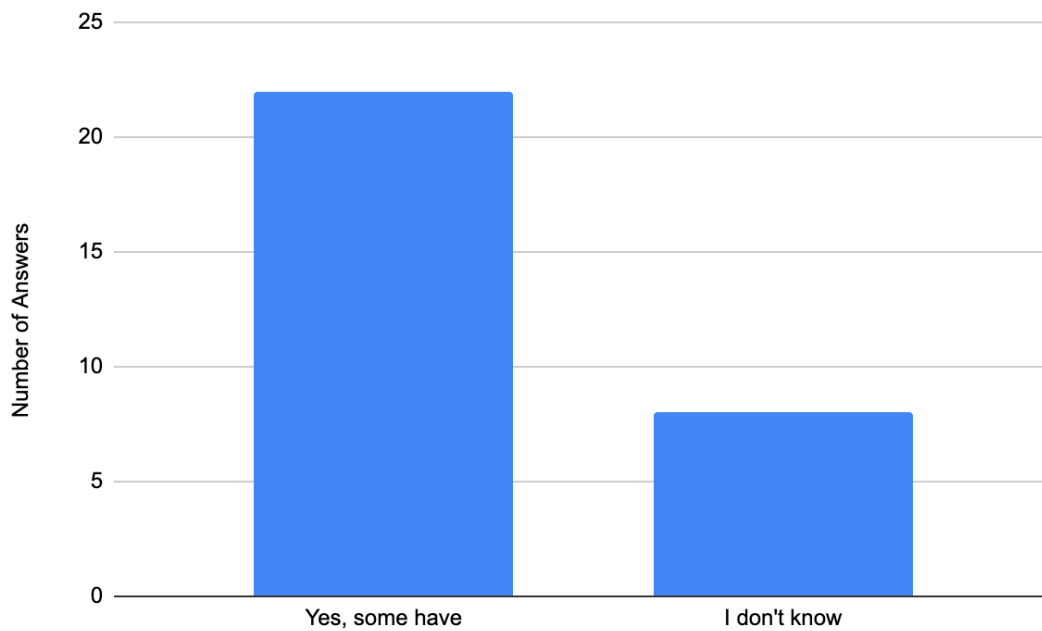
1. Since the crisis began, do you know of any wineries in your state or region which have closed for good? If yes, how many? If not, please enter 0.

All respondents entered 0.

2. If the crisis continues into the summer (e.g. end of July), how many wineries in your organization do you expect to go out of business?

Mean	Median	Minimum	Maximum
9.55	3	0	100

3. Do you know if wineries have applied for federally available relief under the CARES Act, such as the Paycheck Protection Program or others?



Yes, some have	I don't know
22	8

List of Respondents

Colorado Wine Industry Development Board
Family Winemakers of California
Finger Lakes Wine Alliance
French Broad Vignerons
Garden State Wine Growers Association
Idaho Grape Growers and Wine Producers Commission
Illinois Grape Growers and Vintners Alliance
Kentucky Grape & Wine Council
Long Island Wine Council
Maryland Wineries Association
Michigan Wine Collaborative
Montana Grape and Winery Association
NC Wine and Grape Council
NC Winegrower's Association
Napa Valley Vintners
New Mexico Wine
New York Wine & Grape Foundation
Ohio Wine Producers Assn
Oregon Winegrowers Association
Pennsylvania Winery Association
Seneca Lake Winery Association
Tennessee Farm Winegrowers Alliance
Texas Hill Country Wineries
Virginia Wineries Association
Walla Walla Valley Wine Alliance
Washington Wine Institute
Washington Winegrowers Association
Willamette Valley Wineries Association
Wine Institute
Wine Road Northern Sonoma County

Thanks to all respondents for their help on this survey. Any questions should be directed to jimtrezise@wineamerica.org.