



THE NORTHEAST OHIO GRAPE & WINE ECONOMIC IMPACT STUDY

November 2008

The Northeast Ohio Grape & Wine Economic Impact Study was a collaboration with David L. Marrison, Assistant Professor, The Ohio State University, Ashtabula County Extension, Donniella Winchell, Executive Director, Ohio Wine Producers Association and Maurine Orndorff, Agricultural Programs Technician, Lake County Soil & Water Conservation District.

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Executive Summary



In 2007 Ohio State University Extension, Ashtabula, Lake County Soil & Water Conservation District and Ohio Wine Producers Association collaborated to collect data to assess the economic impact of the grape and wine industry in Ashtabula, Geauga and Lake counties. This unique agricultural area, which includes the federally designated Grand River and Lake Erie Viticultural Areas, contains microclimates, soils, temperature, water and topography that are found nowhere else in the country and which are ideal for grape production. The geographical proximity to the Cleveland Metropolitan Area has put increasing development pressures on these resources, which threaten the future of the industry.

This study is part of a concerted effort to promote agricultural sustainability and preservation of our important and unique agricultural lands by providing data that documents the fiscal and economic value of farmland in Northeast Ohio. The companion study is the update of the Cost of Community Services Study for Madison Village and Township, Lake County, Ohio, March 2008. Both studies were funded by a grant from The Cleveland Foundation.

Three separate studies were conducted in the summer and fall of 2007 to determine the contribution of grape growers, wineries and winery patrons to our regional economy. The studies examined demographic data, grape production, wine sales, capital and variable investments, future operational concerns, spending habits of winery visitors and the economic multiplier effect of the grape and wine industry in Northeast Ohio. The survey data were tabulated, statistically reviewed and summarized by Ohio State University Extension faculty.

The surveys collected data that is a direct impact of the grape growing and wine producing industry. Other ancillary revenues as a result of the grape and wine industry, such as Vintage Ohio and other grape festivals, wine trails, visitors to the Geneva State Park Lodge, and viticultural research, are not included in this study. This information will be gathered as a part of another study.

The grape and wine industry has been a long standing industry of Northeast Ohio with more than 1,300 acres of vineyards and 20 wineries. A 2007 survey by the Orbitz Worldwide travel company ranked the Grand River Viticultural Area as the 6th favorite destination in the country for wine and food travelers.

An estimated 494,000 people visit Northeast Ohio winery and vineyard operations each year. 88.5% of the winery visitors indicated that the wineries were the primary reason for

their visit to Northeast Ohio. 33.6% spent an overnight in the tri-county area, and 72.5% of the visitors ate dinner while visiting wineries. Winery patrons spend more than \$13 million in the tri-county area on wine, food and gifts at wineries and add to the local economy by purchasing gas, food and lodging in the communities surrounding the wineries.

The grape and wine industry employs approximately 180 people. In addition, 46 jobs are created in non-grape and wine businesses as a result of the Northeast Ohio grape and wine industry.

Total capital investment by the vineyard and winery operations was estimated at \$11 million for the past five years and an estimated \$6.5 million of capital expenditures will be made in the next five years. 45% percent of the operations purchase over 80% of their annual expenditures from Ohio businesses.

An estimated 3,000 tons of juice grapes are produced by the Northeast Ohio grape juice industry worth \$663,000. An estimated 332,000 gallons of wine are produced worth \$10.2 million in retail, wholesale and direct sales. Wineries sell almost \$3.7 million in meals and restaurant sales on-site, \$200,000 in gift sales, \$118,000 in special events, \$7,000 for lodging and \$115,000 for other non-wine sales.

The estimated annual output of the industry is \$15 million, which includes wine sales, gift and other non-wine sales, special events and restaurant sales. Estimations of the ripple effect of this value on Ohio's economy indicate a \$24.25 million impact on Ohio's sales, \$31.17 million to its gross state produce and \$35.47 million to Northeast Ohioans' income.

The survey looked at issues that will effect future operations as well. Based upon responses received, over 193 acres of grapes could be planted during the next five years. 69% reported abandoned vineyards within one mile of their operation. 48% indicated that vineyards had been removed or developed for housing within one mile of their operation. The top three concerns for the future were costs, employees and regulations. Another potential threat to the industry is the lack of planning for the transition of their businesses. 84.6% of those who grow grapes and make wine, and 91.7% of the growers-only reported that they did not have a written estate plan. 54.8% did not know who would take over their operation in the future.

It is clear that the wine and grape industry in Northeast Ohio makes a direct and significant contribution to our regional economy and drives other economic development.

The Northeast Ohio Grape and Wine Economic Impact study shows that the grape and wine industry is significant and brings millions of dollars to our regional economy. Communities need to consider the value of agriculture as they plan for growth and give agriculture a place at the table of economic development.



Appendices

APPENDICES

- A. The Impact of the Northeast Ohio Grape & Wine Industry
- B. 2007 Northeast Ohio Grape & Wine Study
- C. 2007 Northeast Ohio Wine Lover's Survey
- D. Land Use & Development Issues of the NE Ohio Grape & Wine Industry
- E. Winery Survey
- F. Grower Survey
- G. Wine Lover's Survey

**The Impact of the Northeast Ohio Grape
& Wine Industry**

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Introduction

The grape and wine industry has been a long standing industry of Northeast Ohio with more than 1,300 acres of grape vineyards and 20 wineries. A 2007 survey by the Orbitz Worldwide travel company¹ ranked the Grand River Valley grape region in Ashtabula and Lake counties as it's 6th best United States wine destinations.

In 2007, three separate studies were conducted to analyze the economic activity generated by the grape and wine industry in the Northeast Ohio counties of Ashtabula, Lake & Geauga counties. Three organizations (Ohio State University Extension, Ohio Wine Producers Association, and Lake County Soil & Water Conservation District) collaborated to conduct the Northeast Ohio Grape and Wine Study², Northeast Ohio Wine Lover's Survey³ and the Land Use & Development Issues of the Northeast Ohio Grape & Wine Industry Survey⁴. These studies examined demographic data, grape production, wine sales, capital and variable investments, future operational concerns, spending habits of winery visitors and the economic multiplier effect of the Northeast Ohio grape & wine industry.

This paper is designed to compile the economic activity reported by these studies as well as summarize additional economic activity generated by the Northeast Ohio grape and wine industry.

Northeast Ohio Grape & Wine Study

Forty-two producers (67.7%) responded to the survey. Sixty-one percent (n=27)⁴ of the grower-only group responded and seventy-five percent (75.0%) of the winery operations responded. A total of 582 acres of grapes were reported by survey respondents.

The average age for the principal manager was 55.85 years with fifty-nine of the managers (58.5%) between the ages of 50-69 years old. Seventy-one percent (71%) of the vineyard operations were sole proprietor, twelve percent (11.9%) corporations, ten percent (9.5%) limited liability companies, and two percent (2.4%) partnership. Wineries who own a vineyard were more inclined to sole proprietor, limited liability companies or corporations for their business structure. The business structure for Ohio wineries was reported as thirty-three percent (33%) limited liability companies or corporation, twenty percent (20%) sole proprietor, seven percent (6.7%) partnership and seven percent (6.7%) responded as not applicable

Respondents were asked to estimate how many people visit their business each year (winery and/or vineyard). Respondents were asked to select the range of visitors per year. A total of 332,750 visitors were reported by respondents (n=42). The majority of these visitors were reported by winery operations as the grower-only group reported only 6,750 visitors per year. Based on survey response data, it was estimated the total number of visitors to Northeast Ohio winery and vineyard operations to be 494,000 visitors per year.

It is estimated 180 persons work in the Northeast Ohio vineyards and 138 persons in Northeast Ohio wineries. Managers were also asked about the benefits they offer their employees. The grower-only group reported offering no benefits to their employees. Over fifty percent (52.3%) of the winery respondents do not provide benefits. However, some wineries are offering benefits with seven percent (7.1%) offering medical insurance, dental insurance, or stock or ownership options.

Managers were also asked to report ranges for their fixed and variable expenses for their winery and vineyard operations. Total capital investment for all Northeast Ohio vineyards was estimated at almost \$4 million for the past five years. It is estimated an additional \$3.3 million of capital expenditures will be made in the next five years. It is estimated almost \$7 million of winery capital expenditures were made during the past five years and \$3.2 million will be made in the next five years. Annual variable expenses for Northeast Ohio vineyards were estimated at \$2 million and \$4.6 million for Northeast Ohio wineries.

Respondents were also asked to select a range for their total annual expenditures made with Ohio businesses. Forty respondents indicated on average they purchase fifty-nine percent (59.3%) of their annual expenses with Ohio businesses. Forty-five percent of the Northeast Ohio operations spend over eighty percent (80%) of their annual expenditures with Ohio businesses.

A total of 581.80 acres of grapes were reported by 42 respondents. The average price per ton and yield per acre were also requested. Respondents reported producing close to 2,000 tons of juice grapes valued at \$440,839. An estimated 3,000 tons of juice grapes are produced by the Northeast Ohio juice grape industry worth \$663,000.

Winery operations were asked to report the gallons of wine they produced each year on average. A total of 265,000 gallons are produced for the respondents with forty-three percent (42.9%) of the respondents producing less than 5,000 gallons per year. An estimated 332,000 gallons are produced by Northeast Ohio wineries. Seventy-two percent (71.7%) of Northeast Ohio wines were reported to be marketed as retail sales.

Northeast Ohio wine sales are estimated at \$10.2 million, \$200,000 for gift sales, \$118,000 for special events, \$7,000 for lodging and \$115,000 for other non-wine sales. An additional \$3.68 million is estimated to be spent each year for meal and restaurant sales at Northeast Ohio wineries (Table 1).

Table 1. Wine Sales and Services

Winery Sales	14 Survey Respondents	Extrapolation for Northeast Ohio
Retail Wine Sales	\$3,263,000	\$4,667,000
Wholesale Wine Sales	\$3,638,000	\$5,201,000
Wine Sales to Distributors	\$225,000	\$322,000
Food/Restaurant Sales	\$2,575,000	\$3,683,000
Gift Sales	\$140,000	\$200,000
Special Events	\$83,000	\$118,000
Lodging	\$5,000	\$7,000
Other	\$80,000	\$115,000
Total	\$10,009,000	\$14,313,000

Land Use & Development Issues of the Ohio Grape & Wine Industry

The grape and wine industry has been a dynamic part of the Ohio's agricultural industry for decades. This project also examined the land use and development issues being experienced by the Northeast Ohio Grape & Wine Industry.

Respondents indicate they plan to plant 156 new acres of grapes during the next five years and anticipate planting 156.5 new acres of grapes in the next five years.

Using the response data, over 193 acres of new grapes could be planted during the next five years in Northeast Ohio. Over forty percent (40.5%) of the respondents indicated they would consider renovating, expanding or establishing a vineyard if a statewide vine grant program was offered with an additional twenty-six (26.2%) of the respondents uncertain. Fifty-two percent (52.4%) of all respondents reported they would consider compensation for preserving and protecting their vineyard property from development.

There has been concern expressed with the future of the industry due to housing and development pressure. Only five percent (4.8%) of the respondents have sold any of their land for development during the past five years. Sixty-nine percent (69.0%) reported abandoned vineyards within one mile of their operation. Forty-eight percent (48.8%) of the respondents indicated vineyards had been removed or developed for housing within one mile of their operation. However, only seven percent (7.3%) reported having experienced any negative impact due to this construction.

Only nineteen (19.0%) of all respondents reported having any problems with zoning or other state and/or local regulations which affected the achievement of their business goals. However, winery operations indicated significantly greater problems with local or state regulations (40.0% versus 7.4%) than the grower-only group.

The top three operational concerns for the future were costs, employees, and regulations. Another potential threat to the Northeast Ohio and grape wine industry is the lack of planning for the transition of their business. Fifty-four percent (54.8%) of all respondents indicated they did not know who would take over their operation in the future. While forty-three percent (42.9%) of all respondents indicated a family or non-family member would take over their operation, many had not formalized their intentions through a written estate plan. Eighty-four percent (84.6%) reported they did not have a written estate plan. This number was higher for the grower-only at ninety-two percent (91.7%). There is a clear need for succession and estate planning with this industry especially with the grower-only group.

Northeast Ohio Wine Lover's Survey

Respondents to the Northeast Ohio Wine Lover's Surveys provided information on wine preferences, spending patterns, and demographics. Respondents to the survey indicated their preference for wine to be forty-nine percent (48.7%) red, thirty-eight percent (37.6%) white and fourteen percent (13.7%) undecided. Fifty-six percent (56.0%) indicated they prefer a sweet wine, thirty-nine percent (38.5%) dry, and six percent (5.5%) undecided.

Over eighty-eight percent (88.5%) of visitors indicated the wineries were the primary purpose of their visit to the local region and thirty-four percent (33.6%) planned to stay overnight in the region. The average overnight stay reported was 1.47 nights. For those staying overnight, 21.3% stayed at a private residence, 23.4% at a hotel, 21.3% at a bed & breakfast, 19.1% at a lodge, 10.6% at a campground and other 4.3%. The average size of the parties visiting the wineries was 3.05 persons.

Respondents indicated they planned to visit an average of 3.93 wineries on their trip. During their visits, respondents planned to purchase 3.42 glasses and 3.77 bottles of wine. They also planned to purchase 5.60 bottles to take home at the average cost of \$8.11. Nine percent (9.0%) planned to purchase a gift at the winery at an average expense of \$54.61.

In addition to these expenditures, consumers purchased gas, food and lodging while touring wine country (Table 2). It should be noted the information listed in Table 2 does not reflect monies spent for other activities (e.g., golf, museums, and sporting events) during their trip. On their trip, thirty-seven percent (36.6%) of the respondents planned to purchase an average of 12.61 gallons of gas. Respondents were also asked what meals they would eat in the tri-county area as a result of visiting the wineries. Nearly twenty percent (19.8%) planned to eat breakfast, fifty percent (50.4%) lunch, and seventy-three percent (72.5%) dinner.

Table 2. Estimated Value of Consumer Spending for Lodging, Gas, & Meals

Item	Percentage of Survey Respondents Purchasing (n=131)	Value for Survey Group	Estimated Value to Winery Visitor Population (estimate of 494,000 visitors) ^f
Hotel, Lodge or Bed & Breakfast	22.90%	\$738 ^a	\$2,782,000 ^f
Gas	36.6%	\$545 ^b	\$2,055,000 ^f
Breakfast	19.8%	\$130 ^c	\$490,000 ^f
Lunch	50.4%	\$660 ^d	\$2,490,000 ^f
Dinner	72.5%	\$1,425 ^e	\$5,373,000 ^f
Total	-----	\$3,498	\$13,190,000 ^f

^a Value of lodging used was \$75 per night (1.47 nights per average stay).

Assumes average party size of 3.05 persons travels and lodges together.

^b Value of gas was \$2.75 per gallon with average purchase of 12.61 gallons (\$34.67 total).

Assumes average party size of 3.05 persons travels together

^c Breakfast valued at \$5.00 per person

^d Lunch valued at \$10.00 per person

^e Dinner valued at \$15.00 per person

^f Assumes 494,000 visitors per year and percentages from survey group hold true to entire population. Rounded to nearest thousand

It is estimated nearly \$13.2 million is spent by visitors for gas, lodging and food in the tri-county area. This estimation was calculated using \$75 for lodging, \$5 for breakfast, \$10 for lunch and \$15 for dinner. A gas price of \$2.75 per gallon was used based on the average gas prices for Northeast Ohio during the survey period. The average party size of 3.05 persons was used in the lodging and gas calculations.



Ripple Effect of the Northeast Ohio Grape & Wine Industry

OHFOOD, an acronym for Ohio food, is a sophisticated input-output model developed by Dr. Tom Sporleder from The Ohio State University's Farm Income Enhancement Program⁶. This model is based on the Impact Analysis for Planning (IMPLAN) estimation procedure developed by the U.S. Forest Service. By utilizing the OHFOOD multipliers, estimations can be made of the ripple effect on Ohio's economy from the Northeast Ohio grape and wine industry.

Table 3 lists the OHFOOD multipliers applicable to the Northeast Ohio grape & wine industry. Multipliers utilized for this study were output, gross state product, income and employment. Each of these indicators measures different, yet related, linkages within Ohio's economy. The OHFOOD multipliers are used to show the effect a \$1.00 increase will have on each sector of Northeast Ohio's economy. These multipliers measure the direct, indirect, and induced effects (Sporleder, 2008).

Table 3. Northeast Ohio Economic Multipliers and Employment, 2006

Ohio Grape & Wine Industry Output Sectors	OHFOOD Output Multiplier	OHFOOD Gross State Product Multiplier	OHFOOD Income Multiplier	OH Food Employment Multiplier
Juice Grape Sales	1.4176*	1.3379	1.4859	1.2540
Wine Sales	1.6015	2.2228	2.7039	3.9350
Gift Sales & Other Non-Wine Sales	1.6363	1.5345	1.5376	1.4503
Meal & Restaurant Sales	1.7491	1.8410	1.6623	1.2419

*Shaded entries are explained below.

The output multiplier measures the total change in output generated by a \$1.00 change in final demand. For instance, the output multiplier for the juice grape sales sector is 1.4176. This means a \$1 million in additional output from the juice industry will result in an increase of \$1.4 million to Ohio's total output.

Gross state product (GSP) is a measure of the final market value of goods and services produced by labor and property located in a state. It is the state counterpart to the nation's gross domestic product (GDP). The OHFOOD gross state product multiplier for wine sales is 2.2228. This means a \$1 million increase in wine sales by Northeast Ohio wineries translates to a \$2.23 million increase in Ohio's gross state product.

The income multiplier measures the total change in personal income resulting throughout the economy from a \$1.00 change in a sector. The OHFOOD income multiplier for gift sales and other non-wine sales is 1.5376. This means each additional \$1.00 of income from wine gift sales generates \$1.54 for Ohioan's income.

The employment multiplier examines the ripple effect to employment in the state. This multiplier examines the number of full time employee positions which are generated in jobs outside of the grape and wine sector as a result of this industry. For example, the OHFOOD employment multiplier for the meals and restaurant sector is 1.2419. The interpretation for this multiplier is the total employment effect for a \$1 million change in meal and restaurant sales at Ohio wineries will result in an additional 1.24 person-years of additional employment are created outside of the industry as a result of the \$1 million increase.

Table 4 shows the results of placing the different sectors of the Northeast Ohio grape and wine industry into the OHFOOD model. This table shows the ripple effect the industry has to each sector of Ohio's economy. The \$15 million dollar economic output of the grape and wine industry in northeastern Ohio results in a \$24.25 million impact on Ohio's output, \$31.17 million to its gross state product and \$35.47 million to Northeast Ohioan's income.

Table 4. OHFOOD Multiplier Impact of the Northeast Ohio Grape & Wine Industry

Northeast Ohio Grape & Wine Industry Output Sectors	Estimated Economic Output of Northeast Ohio Grape & Wine Industry (million \$)	OHFOOD Output Multiplier (million \$)	OHFOOD Gross State Product Multiplier (million \$)	OHFOOD Income Multiplier (million \$)	OH Food Employment Multiplier (F.T.E.)
Juice Grape Sales	\$0.66	\$0.94	\$1	\$1.1	1
Wine Sales	\$10.2	\$16.3	\$22.7	\$27.6	40
Gift Sales & Other Non-Wine Sales	\$0.44	\$0.71	\$.67	\$.67	0.6
Meal & Restaurant Sales	\$3.7	\$6.5	\$6.8	\$6.1	4.5
Total	\$15.00	\$24.45 ^b	\$31.17 ^b	\$35.47 ^b	46 ^b

^a Assumes no decline in other sectors of Ohio's economy due to grape & wine economic impact.

Stated in another manner, every \$1 change in the northeastern Ohio grape & wine industry will have a \$2.36 impact on the income of Ohioan's, \$2.08 on gross state product, and \$1.63 on the state output. In addition, 46 jobs are created in non-grape and wine businesses as a result of the Northeast Ohio grape and wine industry. Every \$1 million dollar increase in the northeastern Ohio grape & wine industry will create 3.07 full time jobs in other sectors

Summary

It is evident the Northeast Ohio grape and wine industry is a very valuable component of the agriculture and tourism industries. Northeast Ohio wineries sell \$10.2 million of wine, \$200,000 in gift sales, \$118,000 for special events, \$7,000 for lodging and \$115,000 for other non-wine sales. An estimated 494,000 individuals visit Northeast Ohio wineries each year purchasing wine and spending an additional \$3.68 million for meal and restaurant sales on-site. An annual economic output of \$15 million dollar results in a \$24.25 million impact on Ohio's output, \$31.17 million to its gross state product and \$35.47 million to Northeast Ohioan's income.



For More Information

The complete reports for each of the studies can be accessed at <http://ashtabula.osu.edu>. Copies can also be obtained by calling the Ashtabula County Extension office at 440-576-9008. More information can also be obtained by contacting the following individuals:

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References & Footnotes

¹Orbitz Worldwide Travel Company. (2007) *Fastest-Growing Destinations for Wine and Culinary Enthusiasts*. Accessed on-line September 20, 2007 at: <http://www.orbitz.com/App/Home>

²Marrison, D.L. (2008) The Ohio State University, *Northeast Ohio Grape & Wine Study*. This summary can be accessed at <http://ashtabula.osu.edu>

³Marrison, D.L., Winchell, D. & Orndorff (2007). *Ohio Wine Traveler Survey*. This survey can be accessed at <http://ashtabula.osu.edu>

⁴Marrison, D.L.,(2008). *Land Use and Development Issues of the Northeast Ohio Grape & Wine Industry*. This survey can be accessed at <http://ashtabula.osu.edu>

⁵ (n=27). N is an abbreviation for number of respondents.

⁶Sporleder, Thomas L. (2008, April) The Ohio State University, Columbus, Ohio, November 2007 *OHFOOD: An Ohio Food Industries Input-Output Model, Version 10.0*. Accessible at: <http://aede.osu.edu/resources/docs/pdf/b0ynn1c1-13e0-iqsy-i2rp0o0mhpsivotp.pdf>

2007 Northeast Ohio Grape & Wine Study
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Introduction

The grape and wine industry has been an important part of the Northeast Ohio agriculture industry for many years. The Northeast Ohio counties of Ashtabula, Lake and Geauga are home to 1,300 acres of grapes and 20 wineries. To date, no comprehensive study has been conducted to examine some of the economic activity generated by the grape and wine industry in the Northeast Ohio counties of Ashtabula, Lake & Geauga. Three organizations (Ohio State University Extension, Ohio Wine Producers Association, and Lake County Soil & Water Conservation District) collaborated to conduct the Northeast Ohio Grape and Wine Study. This study examined demographic data, business structure, visitors, labor, employee benefits, grape and wine production, wine sales, and capital and variable expenses.

Procedures

A fifty-three question survey¹ was developed in the spring of 2007 by the research team and pilot tested utilizing input from the Ohio grape industry. This project was reviewed by the Institutional Review Board at The Ohio State University. Survey data were tabulated, statistically reviewed, and summarized by Ohio State University Extension faculty.

Sixty-two vineyard and winery operations were mailed a survey in July, 2007 with a second mailing in October. Twenty of the surveys were sent to winery operations and 42 were mailed to vineyard operations who do not own a winery. These growers are described as grower-only in this summary data. This group is predominantly Concord juice growers with a few producing wine grapes.

Forty-two total producers (67.7%) responded to the survey. Sixty-four percent (n=27) of the grower-only group and 75% (n=15) of the winery operations responded. A total of 582 acres of grapes were reported by survey respondents. Data were analyzed using the statistical program Statistical Package for the Social Sciences (SPSS).

Demographics

Survey respondents were asked a variety of demographic questions about themselves and of their winery and/or vineyard operations. These questions examined the age of principal managers, business structure, year of establishment, and how their operations were acquired. Respondents were also asked to report the number of visitors to their operation, the number of family and non-family members employed, and benefits offered to employees.

Respondents were asked to list the age of the principal manager or managers of their business. (Table 1). As many as four principal managers could be reported. The average age for the principal manager was 55.85 years with 58.5% between the ages of 50-69 years old. 45% percent of the respondents reported a second manager, 16.7% a third manager and 14.3% a fourth manager.

Table 1. Principal Age of Northeast Ohio Winery and Vineyard Managers

Age	Principal Manager (n=42)	Manager #2 (n=19)	Manager #3 (n=7)	Manager #4 (n=6)
Under 30 years old	2.4%	2.4%	4.8%	4.8%
30-39 years old	7.3%	9.5%	0%	4.8%
40-49 years old	19.5%	4.8%	7.1%	0%
50-59 years old	26.8%	16.7%	4.8%	2.4%
60-69 years old	31.7%	11.9%	0%	0%
Over 69 years old	12.3%	0%	0%	2.4%
Do not have any additional managers	---	54.7%	83.3%	85.6%

Vineyard owners were asked how they acquired their operation. Over thirty-five percent (35.7%) started their vineyard, thirty-eight percent (38.1%) purchased their vineyard, twenty-one percent (21.4%) inherited their vineyard, and five percent (4.8%) do not own a vineyard. Thirty-four percent of the vineyards were started prior to 1960, thirty-one percent (31%) were started from 1960-1980, twenty-percent (20%) from 1990 - 1999, and fourteen percent (14%) were started since 2000.

Vineyard managers were also asked to report the business structure of their vineyard operation (Table 2). Seventy-one percent were sole proprietor, twelve percent (11.9%) corporation, ten percent (9.5%) limited liability company, and two percent (2.4%) partnership. There was a significant difference ($\alpha = 0.01$) with regards to business structure between wineries that have vineyard operations and the grower-only group. The grower-only group used sole proprietor as their main business structure (93.6%) whereas wineries (which operate vineyards) were more apt to utilize sole proprietor, limited liability companies or corporations for their business structure.

Table 2. Structure of Northeast Ohio Vineyard Operations

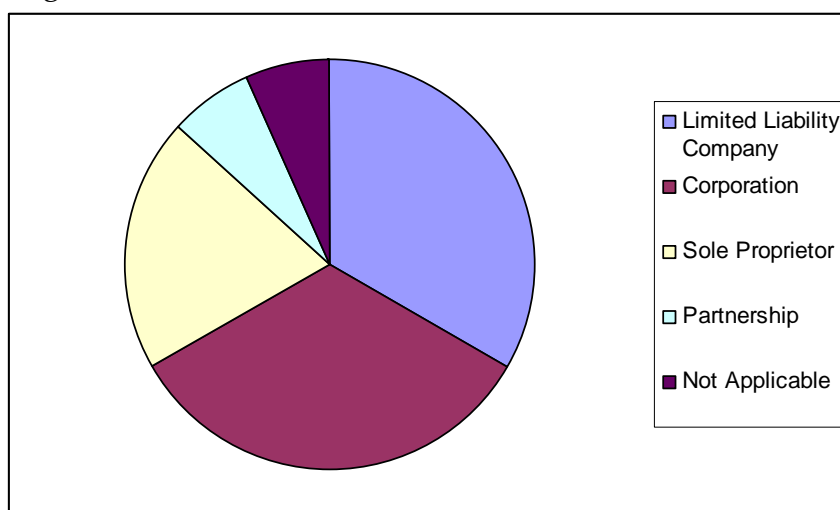
Business Structure	All Vineyard Operations (n=42)	Vineyards owned by Wineries (n=15)	Grower-Only Vineyards (n=27)
Sole Proprietor	71.4%	33.3%	93.6% ^z
Partnership	2.4%	0%	3.7%
Limited Liability Company	9.5%	26.6%	0
Corporation	11.9%	26.6%	3.7%
Not Applicable	4.8%	13.3%	0%

^z Responses significantly different at $\alpha = 0.01$

Winery operators were also asked how their winery was acquired. Eighty percent started their winery with the remaining twenty percent (20%) purchasing. Over fifteen percent (15.5%) started their winery prior to 1975, sixteen percent (15.5%) established their winery from 1980 - 1989, twenty-three percent (23%) from 1990 -1999 and forty-six percent (46%) started their winery since the year 2000.

Wineries were asked about their winery business structure (Figure 1). Thirty-three percent (33.0%) use either a limited liability companies or corporations, twenty percent (20%) sole proprietor structure, seven percent (6.7%) partnership and seven percent (6.7%) responded as not applicable.

Figure 1. Business Structure for Northeast Ohio Wineries



Respondents were asked to estimate how many people visit their business each year (winery and/or vineyard). Respondents were asked to select the range of visitors per year (Table 3). A total of 332,750 visitors were reported by respondents (n=42) with the majority of these visitors reported by winery operations. The grower-only group reported only 6,750 visitors per year.

The total number of visitors to Northeast Ohio winery and vineyard operations was estimated to be 494,000 visitors per year. This estimation was made based on the assumption the respondent group was reflective of the entire population and that no systematic bias existed.

Table 3. Annual Visitors to Northeast Ohio Wineries & Vineyard Operations

Range of Visitors	Percentage in Each Visitor Range (n=42)	Visitors to Survey Respondents Vineyards & Wineries ^a	Total Estimated Visitors to Northeast Ohio's Grape & Wine Industry ^b
No visitors	26.2%	0	0
1 to 499	35.7%	3,750	6,000
500 to 999	4.8%	1,500	2,000
1,000 to 4,999	9.5%	10,000	15,000
5,000 to 9,999	4.8%	15,000	22,000
10,000 to 24,999	7.1%	52,500	78,000
25,000 to 49,999	0%	0	0
50,000 to 74,999	2.4%	62,500	93,000
75,000 to 100,000	2.4%	87,500	130,000
Over 100,000	2.4%	100,000	148,000
No response	4.8%	---	---
Total	100%	332,750	494,000

^a Calculated by multiplying the number of respondents in each range times the mid point of the range.

^b Calculated by extrapolating respondent data to entire survey population using a factor of 1.48. Factor was calculated using survey response percentage. Rounded to nearest thousand people.

Respondents were asked to report the number of family and non-family members working in the vineyard (Table 4) and winery operations (Table 5). These numbers were reported using a five person range. Thirty-one vineyard operations reported 78 family members assisting with their operation. Twenty-eight operations reported hiring an additional 102 non-family members to assist with vineyard work. A total of 180 individuals were reported to assist with vineyard work.

It is estimated 180 persons work in the Northeast Ohio vineyards. This estimation was calculated utilizing the 67.6% survey response data (factor of 1.48). This estimation was made based on the assumption the respondent group was reflective of the entire population and that no systematic bias existed.

Table 4. Vineyard Labor, Family and Non-Family (n=42)

Range of Vineyard Employees	Family Members Assisting with Vineyard (Percentage)	Family Members Assisting with Vineyard ^a	Non-Family Members Assisting with Vineyard (Percentage)	Non-Family Members Assisting with Vineyard ^a	Total Vineyard Employees
No employees	21.4%	0	26.2%	0	0
1 to 5	73.8%	78	57.1%	60	138
6 to 10	0%	0	7.1%	24	24
11 to 15	0%	0	0	0	0
16 to 20	0%	0	2.4%	18	18
21 to 25	0%	0	0	0	0
26 to 30	0%	0	0	0	0
Over 30	0%	0	0	0	0
Not Applicable	4.8%	----	13%	---	---
Total	100%	78	100%	102	180

^a Calculated by multiplying the number of respondents in each range times the mid point of the range.

Fourteen of the 15 reporting wineries indicated they have a total of 33 family members assisting with their winery operation. Twelve wineries hire a total of 105 non-family members to assist with the wineries. Total reported family and non-family members working in Northeast Ohio wineries is 138 employees. It is estimated 138 persons work in the Northeast Ohio wineries. This estimation was based on winery response rate of seventy-five percent (factor of 1.33).

Table 5. Winery Labor, Family and Non-Family (n=14)

Range of Winery Employees	Family Members Assisting with Winery (Percentage)	Family Members Assisting with Winery ^a	Non- Family Members Assisting with Winery (Percentage)	Non-Family Members Assisting with Winery ^a	Total Winery Employees
Zero	7.1%	0	14.3%	0	0
1 to 5	92.9%	33	50.0%	18	51
6 to 10	0%	0	7.1%	8	8
11 to 15	0%	0	14.3%	26	26
16 to 20	0%	0	0%	0	0
21 to 25	0%	0	7.10%	23	23
26 to 30	0%	0	0%	0	0
Over 30	0%	0	7.1%	30	30
Total	100%	33	100%	105	138

^a Calculated by multiplying the number of respondents in each range times the mid point of the range.



Managers were also asked about the benefits they offer their employees (Table 6). The grower-only group reported offering no benefits to their employees. Over fifty percent of the winery respondents (52.3%) do not provide benefits. However, some wineries are offering benefits with seven percent (7.1%) of the winery respondents offering medical insurance, dental insurance, or stock or ownership options. Some of the other benefits offered by eight percent (8.2%) of the winery respondents included lunch, free use of equipment, and free juice.



Table 6. Benefits Provided to Employees by Vineyard and Winery Operations

Employee Benefits	All Respondents (n=41)	Grower-Only (n= 27)	Winery (n=14)
Medical Insurance	2.4%	0%	7.1%
Dental Insurance	2.4%	0%	7.1%
Stock or Ownership Options	2.4%	0%	7.1%
Retirement Plan (401K)	0%	0%	0%
Eye Insurance	0%	0%	0%
Do not provide any benefits	73.2%	71.9%	52.3%
Other	0%	0%	8.2%

Grape and Wine Production & Sales

A total of 581.80 acres of grapes were reported by 42 respondents (Table 7). The average price per ton and yield per acre were also requested. Respondents reported producing close to 2,000 tons of juice grapes valued at \$440,839. An estimated 3,000 tons of juice grapes are produced by the Northeast Ohio juice grape industry worth \$663,000. This estimation was calculated utilizing the sixty-eight (67.7%) response rate.

No data was reported for yield or average price per ton for table grapes. Wine grape growers reported raising 36.7 acres of hybrid wine grapes and 138.25 acres of vinifera wine grapes. Average prices received by respondents for hybrid wine grapes was \$800/ton, \$271 for juice grapes used for wine and \$1,615 for vinifera wine grapes.

Table 7. Production, Yield and Average Price per Ton

Type of Grapes	Acres of Grapes	Average Yield per Acre (ton/acre)	Average Price (per ton)
Juice Grapes (n=25)	395	5.05	\$221
Juice Grapes for Wine (n=3)	10.6	4.87	\$271
Table Grapes (n=2)	1.25	No Response	No Response
Hybrid Wine Grapes (n=4)	36.7	5.67	\$800
Vinifera Wine Grapes (n=12)	138.25	2.78	\$1615



Winery operations were asked to report the gallons of wine they produced each year on average (Table 8). Twelve producers selected a gallon range for their production with forty-three percent (42.9%) of the respondents producing less than 5,000 gallons per year. A total of 265,000 gallons are produced for the respondents. An estimated 332,000 gallons are produced by Northeast Ohio wineries. This estimation was calculated utilizing response data. This estimation was made based on the assumption the respondent group was reflective of the entire population and that no systematic bias existed.

Table 8. Gallons of Wine by Northeast Ohio Wineries

Gallons Produced	Percentage of Wineries Producing for each gallon range	Total Gallons for Survey Respondents ^a (n=15)	Estimated Gallons ^b
Less than 2,500	14.3%	2,500	3,000
2,500 to 4,999	28.6%	15,000	20,000
5,000 to 9,999	7.1%	7,500	10,000
10,000 to 24,999	21.4%	52,500	70,000
25,000 to 39,999	0%	0	0
40,000 to 74,999	0%	00	0
75,000 to 100,000	7.1%	87,500	116,000
More than 100,000	7.1%	100,000	113,000
Not Applicable	14.3%	----	---
Total	100%	265,000 gallons	332,000

^a Calculated by multiplying the number of respondents in each range times the mid point of the range.

^b Calculated by extrapolating respondent data to entire survey population using a factor of 1.33. Factor was calculated using survey response percentage. Rounded to nearest thousand gallons.



Winery managers were asked to indicate how much of their wine sales are retail (Table 9). Fourteen respondents reported this information on a ten point percentage scale. Eight respondents (57.2%) reported marketing 80-100% of their wine through retail sales. An average of seventy-two percent (71.7%) was reported for retail sales by all respondents.

Table 9. Retail Wine Sales for Northeast Ohio Wineries

Percentage of Sales	Percentage of Retail Sales
1-9%	0%
10-19%	7.1%
20-29%	7.1%
30-39%	0%
40-49%	7.1%
50-59%	7.1%
60-69%	0%
70-79%	0%
80-89%	28.6%
90-100%	28.6%
Not Applicable	14.3%
Weighted Average	71.7%



Expense Summary for Northeast Ohio Grape Vineyards and Wineries

Managers were also asked to report ranges for their fixed and variable expenses for their winery and vineyard operations. Fixed assets were defined as capital items which can be depreciated on taxes. These included both long term (land) and intermediate (equipment, tractors) assets. Variable expenses are the annual production costs incurred by the winery and vineyard operations.

Each of the expense data was extrapolated from the respondent data to the entire population of wineries and vineyards in Northeast Ohio. Again, it should be noted this estimation was made based on the assumption that the respondent group was reflective of the entire population and that no systematic bias existed.

Thirty-eight vineyard operations reported they made capital investments of \$2.7 million in their vineyards during the past five years (Table 10). Thirty-six respondents indicated they would make capital investment totaling \$2.2 million in their vineyards during the next five years (Table 11).

Table 10. Vineyard Capital Investments During Past Five Years (n=42)

Vineyard Capital Investment during past five years	Percentage	Total Dollar Value of Capital Investments for Survey Respondents	Estimated Value of Capital Investments for All Vineyards ^a
Zero	2.4%	\$0	\$0
Under \$50,000	59.5%	\$625,000	\$925,000
\$50,000 to \$99,999	16.7%	\$525,000	\$777,000
\$100,000 to \$149,999	4.8%	\$250,000	\$370,000
\$150,000 to \$199,999	2.4%	\$175,000	\$259,000
\$200,000 to \$249,999	0%	\$0	\$0
\$250,000 to \$299,999	0%	\$0	\$0
\$300,000 to \$400,000	4.8%	\$700,000	\$1,036,000
Over \$400,000	2.4%	\$400,000	\$592,000
Not Applicable	7.1%	--	--
Total	100%	\$2,675,000	\$3,959,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.48.

Rounded to nearest thousand.

Table 11. Vineyard Capital Investments Planned for the Next Five Years

Vineyard Capital Investment during past five years	Percentage	Total Dollar Value of Capital Investments <u>planned</u> for Survey Respondents	Estimated Value of Capital Investments for All Vineyards ^a
Zero	2.4%	\$0	\$0
Under \$50,000	69.0%	\$725,000	\$1,073,000
\$50,000 to \$99,999	4.8%	\$150,000	\$222,000
\$100,000 to \$149,999	4.8%	\$250,000	\$370,000
\$150,000 to \$199,999	0%	\$0	\$0
\$200,000 to \$249,999	0%	\$0	\$0
\$250,000 to \$299,999	0%	\$0	\$0
\$300,000 to \$400,000	4.8%	\$700,000	\$1,036,000
Over \$400,000	2.4%	\$400,000	\$592,000
Not Applicable	4.8%	--	---
Total	100%	\$2,225,000	\$3,293,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.48.
Rounded to nearest thousand.



Fifteen winery managers indicated they made \$5.4 million in winery capital investments during the past five years (Table 12). Fourteen indicated they plan on making \$2.5 million worth of capital investment in their wineries in the next five years (Table 13). Again, the capital expenditures were extrapolated to all twenty wineries in Northeast Ohio. It is estimated almost \$7 million of capital expenditures were made during the past five years and \$3.2 million will be made in the next five years.

Table 12. Northeast Ohio Winery Capital Investments for the Past Five Years

Winery Capital Investment during past five years	Percentage	Total Dollar Value of Winery Capital Investments for Survey Respondents	Estimated Total Dollar Value of Winery Capital Investments for All Wineries ^a
Zero	0%	\$0	\$0
Under \$50,000	33.3%	\$125,000	\$163,000
\$50,000 to \$149,999	13.3%	\$200,000	\$260,000
\$150,000 to \$299,999	26.7%	\$900,000	\$1,170,000
\$300,000 to \$499,999	6.7%	\$400,000	\$520,000
\$500,000 to \$999,999	6.7%	\$750,000	\$975,000
\$1,000,000 to \$1,999,999	0%	\$0	\$0
\$2,000,000 to \$4,000,000	6.7	\$3,000,000	\$3,900,000
Over \$4,000,000	0%	\$0	\$0
Not Applicable	6.7%	---	\$0
Total	100%	\$5,375,000	\$6,988,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.3.

Table 13. Northeast Ohio Winery Capital Investments for the Next Five Years

	Percent- age	Total Dollar Value of Winery Capital Investments for Survey Respondents	Total Dollar Value of Winery Capital Investments All Wineries ^a
Zero	0%	\$0	\$0
Under \$50,000	53.3%	\$200,000	\$260,000
\$50,000 to \$149,999	6.7%	\$100,000	\$130,000
\$150,000 to \$299,999	6.7%	\$225,000	\$293,000
\$300,000 to \$499,999	20.0%	\$1,200,000	\$1,560,000
\$500,000 to \$999,999	6.7%	\$750,000	\$975,000
\$1,000,000 to \$1,999,999	0%	\$0	\$0
\$2,000,000 to \$4,000,000	0%	\$0	\$0
Over \$4,000,000	0%	\$0	\$0
Not Applicable	6.7%	\$0	\$0
Total	100%	\$2,475,000	\$3,218,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.3.
Rounded to nearest thousand.

Producers were also asked to list their annual variable expenses for their vineyard operations (Table 14) and winery operations (Table 15). These costs included (but not limited to) chemicals, fertilizers, custom machinery hire, trucking, and supplies for the vineyard operations and purchased grapes, lab and processing supplies, marketing, insurance and legal fees for winery operations. Forty vineyard managers reported a total \$1.38 million for annual variable expenses with an estimated value for all Northeast Ohio vineyards to be just over \$2 million.

Fifteen wineries reported a total of \$3.5 million in variable winery expenses for 2006 with an extrapolated estimation for variable expense for all northeastern Ohio wineries at \$4.6 million.

Table 14. Variable Expenses for Northeast Ohio Vineyard Operations

	Percentage	Total Dollar Value of Variable Expenses for Survey Respondents	Estimated Value for Vineyards ^a
Zero	2.4%	\$0	\$0
Under \$50,000	82.9%	\$850,000	\$1,258,000
\$50,000 to \$99,999	9.8%	\$300,000	\$444,000
\$100,000 to \$149,999	0%	\$0	\$0
\$150,000 to \$199,999	0%	\$0	\$0
\$200,000 to \$249,999	2.4%	\$225,000	\$333,000
\$250,000 and greater	0%	\$0	\$0
Not Applicable	2.4%	---	---
Total		\$1,375,000	\$2,035,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.48.
Rounded to nearest thousand.

Table 15. Variable Expenses for Northeast Ohio Winery Operations (n=15)

	Percentage	Total Dollar Value of Variable Expenses for Survey Respondents	Estimated Value for All Northeast Ohio Wineries ^a
Zero	6.7%	\$0	\$0
\$1 to \$50,000	53.3%	\$200,000	\$260,000
\$50,000 to \$99,999	6.7%	\$75,000	\$98,000
\$100,000 to \$149,999	6.7%	\$125,000	\$163,000
\$300,000 to \$399,999 ^b	6.7%	\$350,000	\$455,000
\$400,000 to \$499,999	6.7%	\$450,000	\$585,000
\$500,000 to \$599,999 ^b	6.7%	\$550,000	\$715,000
1,000,000 to \$2,499,999	6.7%	\$1,750,000	\$2,275,000
\$2,500,000 to \$5,000,000	0%	\$0	\$0
Total		\$3,500,000	\$4,551,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.3.
Rounded to nearest thousand.

^b No data for \$150,000 to \$299,999 or \$600,000 to \$999,999.

Managers were asked to report separately how much they spend on employees for the vineyard and winery operations (Table 16). Thirty-nine vineyard operations reported paying employee expenses of \$660,000 for 2006 with an extrapolated estimate of \$977,000 for all vineyards in Northeast Ohio. Fifteen wineries reported a total of \$937,500 for paid winery employees with an estimate of \$1.2 for all the Northeast Ohio wineries.

Respondents were also asked to select a range for their total annual expenditures made with Ohio Businesses. Forty respondents indicated on average they conduct fifty-nine percent (59.25%) of their annual expenses with Ohio businesses. Forty-five percent (45.0%) of the Northeast Ohio operations purchase over eighty percent (80) of their annual expenditures from Ohio businesses.

Table 16. Wages for Northeast Ohio Vineyard and Winery

Wage Range	Percentage for Vineyard Operations	Vineyard Labor Expense for Survey Respondents (n=42)	Estimated Vineyard Labor for All Vineyards ^a	Percentage for Winery Operations	Est. Winery Labor Expense for Respondents ^c	Estimated Winery Labor for All Wineries ^b
Zero	24.4%	\$0	\$0	13.3%	\$0	\$0
\$1 to \$9,999	51.2%	\$105,000	\$155,000	20.0%	\$15,000	\$20,000
\$10,000 to \$29,999	7.3%	\$60,000	\$89,000	13.3%	\$40,000	\$52,000
\$30,000 to \$74,999	7.3%	\$157,500	\$233,000	20.0%	\$157,500	\$205,000
\$75,000 to \$99,999	2.4%	\$87,500	\$130,000	13.3%	\$175,000	\$228,000
\$100,000 to \$199,999	0%	\$0	\$0	6.7%	\$150,000	\$195,000
\$200,000 to \$299,999	2.4%	\$250,000	\$370,000	0%	\$0	\$0
\$300,000 to \$399,999	0%	\$0	\$0	0%	\$0	\$0
Over \$400,000	0%	\$0	\$0	0%	\$400,000	\$520,000
Not Applicable	4.9%	---	---	6.7%	---	
Total	100%	\$660,000	\$977,000	100%	\$937,500	\$1,220,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.48. Rounded to nearest thousand.

^b Calculated by extrapolating respondent data to entire survey population using a factor of 1.3. Rounded to nearest thousand.

^c n=15.

Wine Sales

Fourteen wineries provided responses for their retail, wholesale, and direct to restaurants/retailers sales for wine sales in 2006 (Table 17). The total value was calculated using the mid point of the selected ranges. In total, the respondents reported \$3.3 million dollars in retail sales, 3.6 million in wholesale sales, and \$225,000 wine sales direct to restaurants/retailers. The total value for these three areas was \$7.13 million.

Table 17. Total Value of Wine Sales for Respondents

Gross Sales Range	Retail Wine Sales Percentage (n=14)	Total Value of Retail Wine Sales ^a	Wholesale Wine Sale Percentage (n=14)	Total Value of Whole Sale Wine Sales ^a	Wine Sales Direct Restaurants/Retailers Percentage (n=14)	Total Value of Wine Sales Direct Restaurants/Retailers Percentage ^a
\$0	0%	\$0	14.3%	\$0	30.8%	\$0
\$1 to \$74,999	28.6%	\$150,000	50.0%	\$262,500	46.2%	\$225,000
\$75,000 to \$149,999	7.1%	\$112,500	0%	\$0	0%	\$0
\$150,000 to \$299,999	14.3%	\$450,000	0%	\$0	0%	\$0
\$300,000 to \$499,999	14.3%	\$800,000	0%	\$0	0%	\$0
\$500,000 to \$749,999	0%	\$0	0%	\$0	0	\$0
\$750,000 to \$999,999	14.3%	\$1,750,000	7.1%	\$875,000	0	\$0
\$1,000,000 to \$1,499,999	0%	\$0	0%	\$0	0	\$0
\$2,000,000 to \$2,999,999	0%	\$0	7.1%	\$2,500,000	0	\$0
Not Applicable	21.4%	---	21.4%	---	23.1%	---
Total	100%	\$3,262,500	100%	\$3,637,500	100%	\$225,000

^a Calculated by multiplying the number of respondents in each range times the mid point of the range.

Wineries were also asked to report the range of gross income generated from sales other than wine. These included gifts sales such as clothing and wine accessories and special events such as weddings (Table 18). Thirteen respondents (92.8%) indicated they receive a combined gross income of \$140,000 from gift sales. Twelve (85.7%) reported receiving a combined gross income of \$82,500 from special events.

Table 18. Total Value of Gift Sales and Special Winery Events for Respondents

Gross Income Range	Gift Sales Percentage (n=14)	Total Value of Gift Sales ^a (n=14)	Special Event Percentage (n=14)	Total Value of Special Events ^a (n=14)
\$0	21.4%	\$0	21.4%	\$0
\$1 to \$9,999	42.9%	\$30,000	42.9%	\$30,000
\$10,000 to \$24,999	14.3%	\$35,000	21.4%	\$52,500
\$25,000 to \$49,999 ^b	14.3%	\$75,000	0%	\$0
Over \$200,000	0%	\$0	0%	\$0
Not Applicable	7.1%	--	14.3%	--
Total	100%	\$140,000	100%	\$82,500

^a Calculated by multiplying the number of respondents in each range times the mid point of the range.

^b No data reported for \$50,000 to \$200,000.

Wineries were also asked to report the range of gross income generated from lodging and other non-wine sales (Table 19). One respondent or eight percent (7.6%) reported a total of \$5,000 of lodging income. Twelve respondents (85.7%) reported gross income from all other non-wine sales with a collective total of \$80,000 in sales.

Table 19. Total Value of Lodging and Other Non Wine Sales for Northeast Ohio Respondents

Gross Income Range	Lodging & Overnight Accommodations Percentage (n=14)	Lodging & Overnight Accommodations ^a (n=14)	All Other Non-Wine Sales Percentage (n=14)	All Other Non-Wine Sales Volume ^a (n=14)
\$0	69.2%	\$0	35.7%	\$0
\$1 to \$9,999	7.7%	\$5,000	35.7%	\$25,000
\$10,000 to \$24,999	0%	\$0	7.1%	\$17,500
\$25,000 to \$49,999	0%	\$0	7.1%	\$37,500
\$50,000 to \$99,999	0%	\$0	0%	\$0
\$100,000 to \$149,999	0%	\$0	0%	\$0
\$150,000 to \$200,000	0%	\$0	0%	\$0
Over \$200,000	0%	\$0	0%	\$0
Not Applicable	23.1%	\$0	14.3%	\$0
Total	100%	\$5,000	100%	\$80,000

^a Calculated by multiplying the number of respondents in each range times the mid point of the range.

Many Northeast Ohio wineries serve food and some offer complete lunch and dinner menus. Ten wineries or seventy-one percent (71.4%) reported gross income from food or restaurant sales at their winery with a total gross income of \$2.58 million (Table 20).

Table 20. Food or Restaurant Sales for Northeast Ohio Survey Respondents

Gross Income from Food or Restaurant Sales	Percentage	Total Value of Restaurant Sales ^a (n=14)
\$0	14.3%	\$0
Under \$50,000	35.7%	\$125,000
\$50,000 to \$199,999	7.1%	\$125,000
\$200,000 to \$349,999	21.4%	\$825,000
\$350,000 to \$499,999	0%	\$0
\$500,000 to \$999,999	0%	\$0
\$1,000,000 to \$1,999,999	7.1%	\$1,500,000
\$2,000,000 to \$3,999,999	0%	\$0
Not Applicable	14.3%	---
Total	100%	\$2,575,000

^a Calculated by multiplying the number of respondents in each range times the mid point of the range.

Estimated Value of Sales for the Northeast Ohio Grape & Wine Industry

The following data provides an extrapolation to the entire population. It should be noted this estimation was made based on the assumption that the respondent group was reflective of the entire population and that no systematic bias existed. A non-respondent survey was not conducted due to time and financial constraints. Cross references to industry data was utilized to verify the extrapolation of wine production (Ohio Department of Taxation), and juice grape production (National Grape Cooperative).

An estimated 3,000 tons of juice grapes are produced by the Northeast Ohio juice grape industry worth \$663,000. Wine sales are estimated at \$10.2 million (Table 21), \$200,000 for gift sales, \$118,000 for special events, \$7,000 for lodging and \$115,000 for other non-wine sales (Table 22). An additional \$3.68 million is estimated to be spent each year for meal and restaurant sales (Table 23).

Table 21. Estimated Total Value of Wine for Northeast Ohio Wineries

Gross Income Range	Estimated Value of Retail Sales ^a	Estimated Value of Wholesale Wine Sales ^a	Estimated Value of Wine Sales Direct Restaurants/Retailers ^a	Total
\$0	\$0	\$0	\$0	\$0
\$1 to \$74,999	\$215,000	\$375,000	\$322,000	\$912,000
\$75,000 to \$149,999	\$161,000	\$0	\$0	\$161,000
\$150,000 to \$299,999	\$644,000	\$0	\$0	\$644,000
\$300,000 to \$499,999	\$1,144,000	\$0	\$0	\$1,144
\$500,000 to \$749,999	\$0	\$0	\$0	\$0
\$750,000 to \$999,999	\$2,503,000	\$1,251,000	\$0	\$3,754,000
\$1,000,000 to \$1,499,999	\$0	\$0	\$0	\$0
\$2,000,000 to \$2,999,999	\$0	\$3,575,000	\$0	\$3,575,000
Total	\$4,667,000	\$5,201,000	\$322,000	10,190,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.43 (14/20 wineries).

Table 22. Estimated Total Value of Gift Sales & Special Events for Northeast Ohio Wineries

Gross Income Range	Gift Sales ^a	Estimated Value for Special Events ^a	Estimated from Lodging ^a	Estimated All Other Non-Wine Sales ^a
\$0	\$0	\$0	\$0	\$0
\$1 to \$9,999	\$43,000	\$43,000	\$7,000	\$36,000
\$10,000 to \$24,999	\$50,000	\$75,000	\$0	\$25,000
\$25,000 to \$49,999	\$107,000	\$0	\$0	\$54,000
\$50,000 to \$99,999	\$0	\$	\$0	\$0
\$100,000 to \$149,999	\$0	\$0	\$0	\$0
\$150,000 to \$200,000	\$0	\$0	\$0	\$0
Over \$200,000	\$0	\$440,000	\$0	\$0
Total	\$200,000	\$118,000	\$7,000	\$115,000

^a Calculated by extrapolating respondent data to entire survey population. using a factor of 1.43 Rounded to nearest thousand dollars.

Table 23. Estimated Value of Food/Restaurant Sales for Northeast Ohio Wineries

Gross Income Range	Estimated Value Food and Restaurant Sales ^a
\$0	\$0
Under \$50,000	\$179,000
\$50,000 to \$199,999	\$179,000
\$200,000 to \$349,999	\$1,180,000
\$350,000 to \$499,999	\$0
\$500,000 to \$999,999	\$0
\$1,000,000 to \$1,999,999	\$2,145,000
\$2,000,000 to \$3,999,999	\$0
Total	\$3,683,000

^a Calculated by extrapolating respondent data to entire survey population using a factor of 1.43 Rounded to nearest thousand dollars.

Summary

It is evident the Northeast Ohio grape and wine industry is a very valuable component of the agriculture and tourism industries. The wineries sell \$10.2 million of wine, \$200,000 in gift sales, \$118,000 for special events, \$7,000 for lodging and \$115,000 for other non-wine sales. An estimated 494,000 individuals visit Northeast Ohio wineries each year purchasing wine and spending an additional \$3.68 million for meal and restaurant sales on-site.

Acknowledgements

The Ohio Wine Producers Association, Lake County Soil & Water Conservation District, and the Lake County Development Council are thanked for their support and assistance. The Cleveland Foundation and the Ohio Grape Industry Program are thanked for their financial support of this study. Dr. Tom Archer from OSU Extension is also thanked for his tireless statistical support. The Ashtabula and Lake County Commissioners are thanked for their continued support of OSU Extension and the Soil & Water Conservation Districts in their respective counties.

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References

¹ Marrison, D., Winchell, D., & Orndorff, M. (2007). Ohio Grape & Wine Survey 2007. Accessible at <http://ashtabula.osu.edu>.



2007 Northeast Ohio Wine Lover's Survey
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Introduction

Northeast Ohio's grape and wine industry continues to be a dynamic part of the state's agriculture and tourism industries with 1,300 acres of grape vineyards and more than 100 wineries. The northeast counties of Ashtabula, Lake, and Geauga counties are home to approximately sixty-five percent of Ohio's vineyards and 20 wineries. A 2007 survey by the Orbitz Worldwide travel company¹ ranked the Grand River Valley wine region in its top ten wine destinations (Grand River Valley at No. 6).

To help determine the economic impact of visitors to the Northeast Ohio Grape and Wine Industry, three organizations (Ohio State University Extension, Ohio Wine Producers Association, Lake County Soil & Water Conservation District) collaborated to conduct the Northeast Ohio Wine Lover's Survey. The purpose of this study was to determine the wine preferences, travel spending patterns, and demographics of visitors to wineries in Ashtabula, Lake, and Geauga counties.

Procedures

A questionnaire was developed in the spring of 2007 and pilot tested utilizing input from the Ohio grape industry. This project was reviewed by the Institutional Review Board at The Ohio State University and the human subjects were deemed exempt from providing signed consent.

One-hundred thirty-one (131) of the estimated 494,000 annual visitors² to wineries in Northeast Ohio were randomly selected and interviewed on random dates and times. Participants were asked twenty-nine questions by volunteers from the Ohio Wine Producers Association. The interviews were conducted between July and October 2007. Data were analyzed using the statistical program Statistical Package for the Social Sciences (SPSS).

Wine Preferences & Travel Spending Patterns

Respondents to the survey indicated their preference for wine to be forty-nine percent (48.7%) red, thirty-eight percent (37.6%) white, and fourteen percent (13.7%) undecided. Fifty-six percent (56.0%) indicated they prefer a sweet wine, thirty-nine percent (38.5%) dry, and six percent (5.5%) undecided.

Over eighty-eight percent (88.5%) indicated the wineries were the primary purpose of their visit to the local region and thirty-four percent (33.6%) planned to stay overnight in the region. The average overnight stay reported was 1.47 nights. For those staying overnight, twenty-one percent (21.3%) stayed at a private residence, twenty-three percent (23.4%) at a hotel, twenty-one percent (21.3%) at a bed & breakfast, nineteen percent (19.1%) at a lodge, eleven percent (10.6%) at a campground and four percent (other 4.3%). The average size of the parties visiting the wineries was 3.05 persons.

Respondents indicated they planned to visit an average of 3.93 wineries on their trip. During their visits, respondents planned to purchase 3.42 glasses and 3.77 bottles of wine. They also planned to purchase 5.60 bottles to take home at the average cost of \$8.11. Nine percent (9.0%) planned to purchase a gift at the winery at an average expense of \$54.61. When asked the question, "How much have they had ever paid for a bottle of wine?", the range was \$10 to \$1,800 with the average price per bottle at \$51.66.

On their trip, thirty-seven percent (36.6%) of the respondents planned to purchase an average of 12.61 gallons of gas. More than ninety-four percent (94.5%) traveled in a car, three percent (3.1%) on a motorcycle, two percent (1.6%) in a motor home and one percent (0.8%) listed other. Respondents were also asked what meals they would eat in the tri-county area as a result of visiting the wineries. Nearly twenty percent (19.8%) planned to eat breakfast, fifty percent (50.4%) lunch, and seventy-three percent (72.5%) dinner.

Respondents were asked what prompted them to make a winery visit. Reasons included: wine trail event (11.5%), part of an organized activity (13.0%), stopped on a whim (23.7%), brought friends (19.8%), and other (32.0%). Some of the reasons listed as other included: planned visit, open house, out of wine at home, Christmas shopping, visit every week, sanity break, to hear the band, email mailing list invitation, and a side trip on their vacation.

Participants were also asked what other attractions they had participated in (or planned to) on their current visit to the area. Respondents planned to shop (13.7%), visit a local museum (3.8%), visit a cultural event (3.8%), visit a farm market (6.1%), visit an amusement facility (7.6%), participate in a nature activity (6.1%), visit an historical site (3.1%), or other (12.2%). Some of the other activities included: car show, see Lake Erie, attend a Cleveland Browns game, boating, parade, church, flea market, medieval fair, picking out a Christmas tree, and antiquing. Seven percent (7.6%) indicated they would only be visiting wineries on their trip.

Respondents were asked to cite the different locations where they typically purchase wine. More than sixty-eight percent (67.9%) purchase at a winery, seventy-one percent (71.0%) at a grocery, thirty-seven percent (36.6%) at a beverage store, twenty-eight percent (28.2%) at a restaurant, and eight percent (7.6%) on-line. Asked how frequently they drink wine, respondents indicated thirty percent (29.2%) drink daily, fifty percent (50.0%) weekly, nineteen percent (19.2%) one or two times per month, and two percent (1.6%) less than once per month.

Fifty-six percent (56.5%) of the respondents had participated in a wine festival or wine event not held on at a winery. Respondents indicated they had participated in Vintage Ohio, Geneva Grape Jamboree, Tall Ships Wine Tasting, Leland Wine Festival in Michigan, American Wine Society, Kent State Wine Festival, Cherry Valley Vintage Ohio, and Niagara Wine Tour.

Demographics

Survey respondents were asked a variety of demographic questions as well. These questions examined gender (Table 1), age (Table 2), household income (Table 3) and formal education attained (Table 4). Fifty-four percent (54.4%) of the survey respondents were female. Fifty-one percent (50.6%) of the respondents' household income ranged between \$50,000 and \$100,000. Over forty-four (44.3%) percent of the survey respondents had a Bachelor's degree or higher with 87.7% having some college course work or higher.

Table 1. Gender of Persons in Respondent's Party

Person	Number	Male	Female
Survey Respondent	131	44.0%	56.0%
Person #2 in Party	101	48.5%	51.5%
Person #3 in Party	51	47.1%	52.9%
Person #4 in Party	44	40.9%	59.1%
Total	327	45.6%	54.4%

Table 2. Age of Persons in Respondent's Party

Age	Respondent	Person #2	Person #3	Person #4
Under 30 years old	7.8%	7.6%	5.8%	4.4%
30-39 years old	8.6%	10.5%	9.6%	11.1%
40-49 years old	25.0%	23.8%	23.1%	24.4%
50-59 years old	34.5%	33.3%	34.6%	37.8%
60-69 years old	17.2%	17.1%	21.2%	11.1%
Over 70 years old	6.9%	7.6%	5.8%	11.1%

Table 3. Household Income

Household Income	Percentage	Valid Percentage
Less than \$25,000	1.5%	2.4%
\$25,000 to \$49,999	13.7%	21.7%
\$50,000 to \$74,999	16.0%	25.3%
\$75,000 to \$99,999	16.0%	25.3%
\$100,000 to \$149,999	11.5%	18.1%
Over \$150,000	4.6%	7.2%
Unknown	36.6%	---

Table 4. Formal Education Attained

Highest Level of Education Completed	Percentage	Valid Percentage
Grade School	0%	0%
High School	10.7%	12.4%
Some College or Technical School	37.4%	43.4%
Bachelor's Degree	16.0%	18.6%
Some Post Graduate Work	6.1%	7.1%
Masters Degree	13.7%	15.9%
Doctorate	2.3%	2.7%
Unknown	13.7%	---

Economic Impact of Travelers

Visitors to Northeast Ohio not only purchase wine, gifts, and food while at the area wineries but also gas, food and overnight lodging while touring wine country. An estimation of the money spent on these three expenses can be found in Table 5. It should be noted the information listed in this table does not reflect monies spent for other activities (e.g., golf, museums, and sporting events) during their trip.

Table 5. Estimated Value of Consumer Spending for Lodging, Gas, & Meals

Item	Percentage of Survey Respondents Purchasing (n=131)	Value for Survey Group	Estimated Value to Winery Visitor Population (estimate of 494,000 visitors) ^f
Hotel, Lodge or Bed & Breakfast	22.90%	\$738 ^a	\$2,782,000 ^f
Gas	36.6%	\$545 ^b	\$2,055,000 ^f
Breakfast	19.8%	\$130 ^c	\$490,000 ^f
Lunch	50.4%	\$660 ^d	\$2,490,000 ^f
Dinner	72.5%	\$1,425 ^e	\$5,373,000 ^f
Total	-----	\$3,498	\$13,190,000 ^f

^a Value of lodging used was \$75 per night (1.47 nights per average stay).

Assumes average party size of 3.05 persons traveling and lodging together.

^b Value of gas was \$2.75 per gallon with average purchase of 12.61 gallons (\$34.67 total).

Assumes average party size of 3.05 persons traveling together.

^c Breakfast valued at \$5.00 per person.

^d Lunch valued at \$10.00 per person.

^e Dinner valued at \$15.00 per person.

^f Assumes 494,000 visitors per year and that percentages from survey group hold true to entire population. Rounded to nearest thousand.

It is estimated nearly \$13.2 million is spent by visitors for gas, lodging and food in the tri-county area. This estimation was calculated using \$75 for lodging, \$5 for breakfast, \$10 for lunch and \$15 for dinner. A gas price of \$2.75 per gallon was used based on the average gas prices for Northeast Ohio during the survey period. The average party size of 3.05 persons was used in the lodging and gas calculations.

Comments

It is evident the grape and wine industry is a very valuable component of the Northeast Ohio agriculture and tourism industries. An estimated 494,000 individuals visit the local wineries each year purchasing wine, food and gifts on-site and add to the local economy by purchasing gas, food and lodging in the communities surround the Northeast Ohio wineries.

Acknowledgements

OSU Extension would like to thank the many volunteers who conducted the interviews. The Cleveland Foundation and the Ohio Grape Industry Program are thanked for their financial support of this study. The Ohio Wine Producers Association, Lake County Soil & Water Conservation District, and the Lake County Development Council are thanked for their support and assistance in this collaborative project. Dr. Tom Archer from OSU Extension is also thanked for his tireless statistical support. The Ashtabula and Lake County Commissioners are thanked for their continued support of OSU Extension and the Soil & Water Conservation Districts in their respective counties.

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References

¹Orbitz Worldwide Travel Company. (2007) *Fastest-Growing Destinations for Wine and Culinary Enthusiasts*. Accessed on-line September 20, 2007 at <http://www.orbitz.com/App/Home>

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**Land Use & Development Issues of the
Northeast Ohio Grape & Wine Industry**

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Introduction

The grape and wine industry is a dynamic part of Northeast Ohio's agriculture industry with 1,300 acres of grape vineyards and 20 wineries located in the counties of Ashtabula, Lake and Geauga counties. Many of these vineyards are located where unique microclimates exist which allow grape vines to develop their buds late in the spring to avoid frost while providing a long growing season which allows for the maturation of the grapes. Water course such as rivers and lakes are often key components of these unique microclimates. Ohio's largest grape growing region is located in Harpersfield, Ohio, on both sides of the Grand River Valley, in close proximity to Lake Erie.

Much of the Northeast Ohio grape growing region is located in the Cleveland Metropolitan Area. This provides a clientele base for grape and wine products with close to 500,000 persons visiting Northeast Ohio grape and winery operations each year. However, this population can exert undue developmental pressure on vineyard operations. The 2000 Ashtabula County Farmland Preservation Plan¹ cited the strong development pressure which exists on the grape and wine industry of Northeast Ohio. The Harpersfield grape growing region was listed as the highest priority by the plan due to its unique microclimate and proximity to urban pressure. It was noted this grape growing region could be adversely affected by development.

In 2007, OSU Extension in cooperation with the Ohio Wine Producers Association and Lake County Soil & Water Conservation District formulated strategies to address the land and development concerns in the Northeast Ohio grape growing region of Ashtabula, Lake and Geauga counties. In order to examine the changes occurring near this grape region, the team developed a survey on vineyard planting and expansion projects, estate planning, development pressures, and concerns for the future operation of grape and wine businesses.

Procedures

A survey² was developed in the spring of 2007 by the research team and pilot tested utilizing input from the Ohio grape industry. This project was reviewed by the Institutional Review Board at The Ohio State University. Survey data were collected, tabulated, statistically reviewed, and summarized by Ohio State University Extension faculty.

Sixty-two vineyard and winery operations were mailed a survey in July, 2007 with a second mailing in October to non-respondents. Twenty surveys were sent to winery operations in Ashtabula, Lake and Geauga counties and forty-two were mailed to vineyard operations that do

not have wineries. These growers are described as “grower-only” in this summary data. This group is predominantly Concord juice growers but includes a few producing wine grapes that are sold to neighboring wineries.

Forty-two producers (67.7%) responded to the survey. Sixty-one percent ($n=27$)³ of the grower-only group responded and 75% ($n=15$) of the winery operations responded. A total of 582 acres of grapes were reported by survey respondents. Data were analyzed using the statistical program Statistical Package for the Social Sciences (SPSS).

Vineyard Plantings in Northeast Ohio

Thirty-eight percent (38.1%) reported planting 88.5 new acres of grapes in the past five years. There was a significant difference between the winery and grower-only group in regards to these new plantings ($\alpha = 0.01$ level)⁴. Seventy-three percent (73.3%) of the winery respondents ($n=11$) reported they planted new acreage compared to nineteen percent (19.2%) of the grower-only group.

Seventeen producers (40.5%) anticipate planting 156.5 new acres of grapes in the next five years. Again, there was a significant difference between the winery and grower-only group in regards to new plantings ($\alpha = 0.01$ level). Eighty percent of the winery respondents ($n=12$) reported they would plant new vines compared to 18.5% of the grower-only group.

Over forty percent (40.5%) of the respondents indicated they would consider renovating, expanding or establishing a vineyard if a statewide vine grant program was offered with an additional twenty-six percent (26.2%) of the respondents uncertain.

Estate Planning

Thirteen percent (13.3%) of winery and nine percent (9.5%) of vineyard respondents indicated they planned on selling or transferring their business in the next five years. Fifty-four percent (54.8%) of all respondents indicated they did not know who would take over their operation in the future with seventy percent (70.4%) of the grower-only group not knowing who will take over their operation (Table 1). Winery and grower-only respondents were significantly different ($\alpha = 0.05$ level) when asked this question. Sixty percent (60.0%) of the winery respondents indicated a family member would be taking over their operation as compared to thirty percent (29.6%) for the grower-only group ($\alpha = 0.05$ level).

While forty-three percent (42.9%) of all respondents indicated a family or non-family member would take over their operation, many had not formalized their intentions through a written estate plan. Eighty-four percent (84.6%) reported they did not have a written estate plan. This number was higher for the grower-only group as ninety-two percent (91.7%) of this group ($n=22$) did not have a written plan whereas seventy-three percent (73.3%) of the winery group did not have an estate plan.

Table 1. Business Transfer Plan

Is There a Plan in Place to Transfer Your Business Upon Your Retirement or Death?	All Respondents (n=42)	Grower-Only Group (n=27)	Winery Respondents (N=15)
Yes, a family member will be taking over	40.5%	29.6% ^y	60.0% ^y
Yes, a non-family member will be taking over	2.4%	0%	6.7%
No, I do not know who will take over my operation	54.8%	70.4% ^y	26.7% ^y
Other	2.4%	0%	6.7%

^y Responses for winery & grower-only were significantly different at the $\alpha = 0.05$ level.

Utility Services & Land Use Changes

Producers were asked to indicate which public utility services were adjacent to their winery or vineyards. Respondents indicated 95.2% electric, 81% cable, 35.7% public water, 11.9% sewer, and 2.4% reported no public services were adjacent to their property.

Producers were also asked six questions with regards to land use changes near their operations (Table 2). Only five percent (4.8%) of the respondents had sold any of their land for development during the past five years. Sixty-nine percent (69.0%) reported abandoned vineyards within one mile of their vineyards. Forty-nine percent (48.8%) reported vineyards had been removed for construction within one mile of their operation in the past five years. Only seven percent (7.3%) indicated they had experienced any negative impact due to construction near their vineyard.

Only nineteen percent (19%) of all respondents reported having any problems with zoning or other state and/or local regulations which affected the achievement of their business goals. However, winery operations indicated significantly greater problems ($\alpha = 0.01$ level) with local or state regulations (40.0% versus 7.4%) than the grower-only group.

Fifty-two percent (52.4%) of all respondents reported they would consider compensation for preserving and protecting their vineyard property from development. The winery and grower-only group differed significantly ($\alpha = 0.05$ level) with regards to this questions as sixty-seven percent (66.7%) of the winery operations would consider this alternative versus forty-four percent (44.4%) of the grower-only group.

Table 2. Questions about Local Land Use

Land Use Impact on Local Vineyard & Winery Operations	All Respondents (n=41) "Yes"	Grower Only (n=26) "Yes"	Winery Operations (n=15) "Yes"
Have you sold any of your land for development during the past five years?	4.8%	3.7%	6.7%
Are there any abandoned vineyards within one mile of your vineyards?	69.0%	77.8%	53.3%
Have any vineyards been removed or developed for housing within one mile of your operation in the past five years?	48.8%	57.7%	33.3%
Have you experienced any negative impact due to housing construction near your vineyard?	7.3%	7.4%	7.1%
Have you had problems with zoning or other state and/or local regulations which have affected the achievement of your business goals?	19.0%	7.4% ^z	40.0% ^z
Would you consider compensation for preserving and protecting your vineyard property from development?	52.4%	44.4% ^y	66.7% ^y

^z Responses for grower-only & winery were significantly different at the $\alpha = 0.01$ level.

^y Responses for grower-only & winery were significantly different at the $\alpha = 0.05$ level.

Respondents were asked if they ever wished to sell their vineyard operation, which statement or statements would best describe themselves or their family (Table 3). Over fifty-nine percent (59.5%) percent would prefer to keep it a vineyard but would sell to the highest bidder if they could get more money from a housing developer than a grower. Sixteen percent (16.7%) percent reported they would sell to the highest bidder and twenty-four percent (23.8%) indicated they would sell it someone who would keep it a vineyard.

Table 3. If You Wanted to Sell Your Vineyard Operation, What Would You Do?

If you sell vineyard, what statement would best describe you?	All Respondents (n=41)	Grower Only (n=26)	Winery Operations (n=15)
May the highest bidder win	16.7%	22.2%	6.7%
Sell to someone who will keep as a vineyard	23.8%	14.8%	40.0%
Prefer to keep vineyard but sell to highest bidder	59.5%	70.4%	40.0%
Other	4.8%	3.7%	6.7%
Not Applicable	4.8%	3.7%	6.6%

Future Operational Concerns

Producers were asked to review ten operational concerns and check their top three concerns for the future (Table 4). The top three concerns for all respondents were costs (78.6%), employees (54.8%), and regulations (42.9%). The top three concerns for the grower-only group were also costs, employees and regulations whereas winery respondents cited employees as their largest concern with costs and regulations following. The grower-only group rated costs as a more significant concern ($\alpha = 0.01$ level) than their winery counterparts.

Table 4. Operational Concerns for the Future

Concern Area	All Respondents (n=41)	Grower-Only (n=27)	Winery Operations (n=14)
Costs	78.6%	92.6% ^z	53.3% ^z
Employees	54.8%	47.2%	73.3%
Regulations	42.9%	44.4%	40.0%
Taxes	38.1%	40.7%	33.3%
Management	26.8%	25.9%	28.6%
Finance	16.7%	18.5%	13.3%
Competition	9.5%	3.7%	20.0%
Information	7.3%	3.7%	14.3%
Technology	7.3%	3.7%	14.3%
Public Service	0%	0%	0%

^z Responses for grower-only & winery were significantly different at the $\alpha = 0.01$ level.

Comments

The grape and wine industry has been a dynamic part of the Northeast Ohio's agricultural industry for decades. Respondents indicate they plan to plant 156 new acres of grapes during the next five years. Using the response data, over 193 acres of new grapes could be planted during the next five years in Northeast Ohio. This assumes that the non-respondents would answer similarly to respondents.

Over forty percent (40.5%) of the respondents indicated they would consider renovating, expanding or establishing a vineyard if a statewide vine grant program was offered with an additional twenty-six percent (26.2%) of the respondents uncertain. Fifty-two percent (52%) of all respondents reported they would consider compensation for preserving and protecting their vineyard property from development.

There has been concern expressed with the future of the industry due to housing and development pressure. Sixty-nine percent (69%) report abandoned vineyards within one mile of their operation. Forty-eight percent (48.8%) of the respondents indicated vineyards had been removed or developed for housing within one mile of their operation. However, only seven percent (7.3%) reported having experienced any negative impact due to this construction.

The top three operational concerns for the future were costs, employees, and regulations. Another potential threat to the Northeast Ohio grape and wine industry is the lack of planning for the transition of their business. Fifty-four percent (54.8%) of all respondents indicated they did not know who would take over their operation in the future. Eighty-four percent (84.6%) reported they did not have a written estate plan. This number was higher for the grower-only at 91.7%. There is a clear need for succession and estate planning with this industry especially with the grower-only group.

Acknowledgements

The Ohio Wine Producers Association, Lake County Soil & Water Conservation District, The Cleveland Foundation, Ohio Grape Industries Program, Lake County Development Council, and OSU Extension are thanked for their financial support and assistance. Dr. Tom Archer from OSU Extension is also thanked for his tireless statistical support. The Ashtabula and Lake County Commissioners are thanked for their continued support of OSU Extension and the Soil & Water Conservation Districts in their respective counties.

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References & Footnotes

¹ Marrison, D.L. & Welker, J. (2000). *Ashtabula County Farmland Preservation Plan*. The plan can be accessed at: http://www2.suite224.net/~ashtswcd/farmland_preservation.htm

² Marrison, D.L. (2008) The Ohio State University, *Northeast Ohio Grape & Wine Economic Impact Study*. This summary can be accessed at <http://ashtabula.osu.edu>

³ (n=27). N is an abbreviation for number of respondents.

⁴ ($\alpha = 0.01$ level). This stands for the significance level of probability

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Ohio Grape & Wine Survey 2007

The Economic Impact of the Ohio Grape & Wine Industry

The Ohio State University Extension, Ohio Wine Producers Association and Lake County Soil & Water Conservation District would like to thank you for your participation in this study which is examining the economic contributions of the Ohio grape and wine industry. Results of this survey will help our industry understand the total economic impact that we have in our state and local communities. Please note that individual survey results will not be shared with others, only collective results (by region and state) will be published. We thank you for taking time to complete this survey!

Section #1 – Demographic, Labor, & Historical Data

1. In what region of Ohio is your vineyard and/or winery operation located? (See the attached map for region descriptions.)

- ☐ Northeast Ohio (If checked, are you located in Ashtabula, Lake or Geauga County? ☐ Yes ☐ No)
- ☐ Northwest Ohio
- ☐ Southeast Ohio
- ☐ Southwest Ohio

2. What is the age of the principal manager(s) of your business?

- | | | | | | | | |
|------------|-------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|----------------------------------|-----------------------------------------|
| Manager #1 | <input type="checkbox"/> < 30 | <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49 | <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60-69 | <input type="checkbox"/> over 69 | |
| Manager #2 | <input type="checkbox"/> < 30 | <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49 | <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60-69 | <input type="checkbox"/> over 69 | <input type="checkbox"/> Not applicable |
| Manager #3 | <input type="checkbox"/> < 30 | <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49 | <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60-69 | <input type="checkbox"/> over 69 | <input type="checkbox"/> Not applicable |
| Manager #4 | <input type="checkbox"/> < 30 | <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49 | <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60-69 | <input type="checkbox"/> over 69 | <input type="checkbox"/> Not applicable |

3. What is the business structure of your vineyard operation?

- ☐ Sole proprietor ☐ Partnership ☐ Limited liability company ☐ Corporation ☐ Do not have a vineyard

4. What is the business structure of your winery operation?

- ☐ Sole proprietor ☐ Partnership ☐ Limited liability company ☐ Corporation ☐ Do not have a winery

5. How did you acquire your vineyard?

- ☐ Started the vineyard ☐ Purchased the vineyard
- ☐ Inherited the vineyard ☐ Not applicable (do not own a vineyard)

6. In what year was your vineyard operation established? _____ ☐ Not applicable

7. How did you acquire your winery?

- ☐ Started the winery ☐ Purchased the winery
- ☐ Inherited the winery ☐ Not applicable (do not own a winery)

8. In what year did your winery receive its commercial winemaking license? _____ ☐ Not applicable

9. Estimate how many people visit your business each year.

- | | | | |
|-------------------------------------------|--------------------------------------------|--------------------------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> 1 to 499 | <input type="checkbox"/> 500 to 999 | <input type="checkbox"/> 1,000 to 4,999 |
| <input type="checkbox"/> 5,000 to 9,999 | <input type="checkbox"/> 10,000 to 24,999 | <input type="checkbox"/> 25,000 to 39,999 | <input type="checkbox"/> 40,000 to 49,999 |
| <input type="checkbox"/> 50,000 to 74,999 | <input type="checkbox"/> 75,000 to 100,000 | <input type="checkbox"/> over 100,000 (estimate number_____) | |

10. How many family members assist with the vineyard operation?

- | | | | | |
|-----------------------------------|-----------------------------------|---------------------------------------------------------------|-----------------------------------|-----------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> 1 to 5 | <input type="checkbox"/> 6 to 10 | <input type="checkbox"/> 11 to 15 | <input type="checkbox"/> 16 to 20 |
| <input type="checkbox"/> 21 to 25 | <input type="checkbox"/> 26 to 30 | <input type="checkbox"/> over 30 (If over 30, how many?_____) | | <input type="checkbox"/> Not applicable |

11. How many non-family employees do you employ to work in the vineyard operation?

- | | | | | |
|-----------------------------------|-----------------------------------|---------------------------------------------------------------|-----------------------------------|-----------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> 1 to 5 | <input type="checkbox"/> 6 to 10 | <input type="checkbox"/> 11 to 15 | <input type="checkbox"/> 16 to 20 |
| <input type="checkbox"/> 21 to 25 | <input type="checkbox"/> 26 to 30 | <input type="checkbox"/> over 30 (If over 30, how many?_____) | | <input type="checkbox"/> Not applicable |

Please flip over to page #2



12. How many family members assist with the winery operation?

- ☐ Zero ☐ 1 to 5 ☐ 6 to 10 ☐ 11 to 15 ☐ 16 to 20
☐ 21 to 25 ☐ 26 to 30 ☐ over 30 (If over 30, how many? _____) ☐ Not applicable

13. How many non-family employees do you employ to work in the winery operation?

- ☐ Zero ☐ 1 to 5 ☐ 6 to 10 ☐ 11 to 15 ☐ 16 to 20
☐ 21 to 25 ☐ 26 to 30 ☐ over 30 (If over 30, how many? _____) ☐ Not applicable

14. Please indicate the benefits you offer your employees (check all that apply).

- ☐ Medical insurance ☐ Dental insurance ☐ Stock or ownership options
☐ Retirement plan (401K) ☐ Eye insurance ☐ Do not provide any benefits
☐ Other _____ ☐ Not applicable

Section #2 – Wine & Grape Production**15. How many gallons of wine do you produce each year on average?**

- ☐ less than 2,500 gallons ☐ 2,500 to 4,999 gallons ☐ 5,000 to 9,999 gallons
☐ 10,000 to 24,999 gallons ☐ 25,000 to 39,999 gallons ☐ 40,000 to 74,999 gallons
☐ 75,000 to 100,000 gallons ☐ more than 100,000 gallons ☐ Not applicable
 (please estimate actual number if over 100,000 _____)

16. Please indicate the number of acres of grapes raised and the average price received.

- ☐ Not applicable (do not raise grapes)

Type of Grape	Acres Raised	2006 Yield (ton/acre)	Price Received per ton for 2006 crop	Average Yield (ton/acre) for the past five years (actual or anticipated for 2002-2006)	Average Price received per ton for the past five years (2002-2006)
Juice		t/a	\$	t/a	\$
Juice grapes sold for wine production		t/a	\$	t/a	\$
Table grapes		t/a	\$	t/a	\$
Hybrid wine varieties		t/a	\$	t/a	\$
Vinifera wine varieties		t/a	\$	t/a	\$

17. Please tell us about your wine production and price per case for 2006.

- ☐ Not applicable (do not produce wine)

Type of Wine	Cases produced in 2006	Average retail price per case	Average wholesale price per case	Average direct to restaurants/retailers price per case
<u>Table Wines</u>				
American Wines		\$	\$	
Hybrid Wines		\$	\$	
Vinifera Wines		\$	\$	
<u>Dessert Wines</u>				
Port		\$	\$	
Sherry		\$	\$	
Ice		\$	\$	
Other Dessert Wines		\$	\$	
<u>Other Wines</u>				
Sparkling		\$	\$	
Fruit Wines		\$		

Please turn to page 3



Wine Sales:**18. What percentage of your wine sales is retail?**

- | | | | |
|-------------------------------------------|-------------------------------------------|--------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> 1 to 9 percent | <input type="checkbox"/> 10 to 19 percent | <input type="checkbox"/> 20 to 29 percent |
| <input type="checkbox"/> 30 to 39 percent | <input type="checkbox"/> 40 to 49 percent | <input type="checkbox"/> 50 to 59 percent | <input type="checkbox"/> 60 to 69 percent |
| <input type="checkbox"/> 70 to 79 percent | <input type="checkbox"/> 80 to 89 percent | <input type="checkbox"/> 90 to 100 percent | <input type="checkbox"/> Not applicable |

19. What was the total value of your retail wine sales (i.e. primary tasting room, internet, phone, fax) in 2006?

- | | | |
|-----------------------------------------------------|-----------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$74,999 | <input type="checkbox"/> \$75,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$499,999 | <input type="checkbox"/> \$500,000 to \$749,999 |
| <input type="checkbox"/> \$750,000 to \$999,999 | <input type="checkbox"/> \$1,000,000 to \$1,499,999 | <input type="checkbox"/> \$1,500,000 to \$1,999,999 |
| <input type="checkbox"/> \$2,000,000 to \$2,999,999 | <input type="checkbox"/> \$3,000,000 to \$4,999,999 | <input type="checkbox"/> \$5,000,000 to 7,499,999 |
| <input type="checkbox"/> \$7,500,000 to \$9,999,999 | <input type="checkbox"/> over \$10,000,000 | <input type="checkbox"/> Not applicable |

20. What was the total value of your wholesale wine sales (i.e. sales to distributors) in 2006?

- | | | |
|-----------------------------------------------------|-----------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$74,999 | <input type="checkbox"/> \$75,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$499,999 | <input type="checkbox"/> \$500,000 to \$749,999 |
| <input type="checkbox"/> \$750,000 to \$999,999 | <input type="checkbox"/> \$1,000,000 to \$1,499,999 | <input type="checkbox"/> \$1,500,000 to \$1,999,999 |
| <input type="checkbox"/> \$2,000,000 to \$2,999,999 | <input type="checkbox"/> \$3,000,000 to \$4,999,999 | <input type="checkbox"/> \$5,000,000 to 7,499,999 |
| <input type="checkbox"/> \$7,500,000 to \$9,999,999 | <input type="checkbox"/> over \$10,000,000 | <input type="checkbox"/> Not applicable |

21. What was the total value of wine sales direct to restaurants/retailers in 2006?

- | | | |
|-----------------------------------------------------|-----------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$74,999 | <input type="checkbox"/> \$75,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$499,999 | <input type="checkbox"/> \$500,000 to \$749,999 |
| <input type="checkbox"/> \$750,000 to \$999,999 | <input type="checkbox"/> \$1,000,000 to \$1,499,999 | <input type="checkbox"/> \$1,500,000 to \$1,999,999 |
| <input type="checkbox"/> \$2,000,000 to \$2,999,999 | <input type="checkbox"/> \$3,000,000 to \$4,999,999 | <input type="checkbox"/> \$5,000,000 to 7,499,999 |
| <input type="checkbox"/> \$7,500,000 to \$9,999,999 | <input type="checkbox"/> over \$10,000,000 | <input type="checkbox"/> Not applicable |

Sales other than Wine**22. What was the total gross income generated from gift sales (example: clothing, wine accessories) in 2006?**

- | | | |
|-------------------------------------------------|-----------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$9,999 | <input type="checkbox"/> \$10,000 to \$24,999 |
| <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$50,000 to \$99,999 | <input type="checkbox"/> \$100,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$200,000 | <input type="checkbox"/> Over \$200,000 | <input type="checkbox"/> Not applicable |

23. What was the total gross income generated from food or restaurant sales at your winery in 2006?

- | | | |
|------------------------------------------------------|-----------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> under \$50,000 | <input type="checkbox"/> \$50,000 to \$199,999 |
| <input type="checkbox"/> \$200,000 to \$349,999 | <input type="checkbox"/> \$350,000 to \$499,999 | <input type="checkbox"/> \$500,000 to \$999,999 |
| <input type="checkbox"/> \$1,000,000 to \$1,999,999 | <input type="checkbox"/> \$2,000,000 to \$3,999,999 | <input type="checkbox"/> \$4,000,000 to \$6,999,999 |
| <input type="checkbox"/> \$7,000,000 to \$10,000,000 | <input type="checkbox"/> over \$10,000,000 | <input type="checkbox"/> Not applicable |

24. What was the total gross income generated from special events (including weddings and other special fees) in 2006?

- | | | |
|-------------------------------------------------|-----------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$9,999 | <input type="checkbox"/> \$10,000 to \$24,999 |
| <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$50,000 to \$99,999 | <input type="checkbox"/> \$100,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$200,000 | <input type="checkbox"/> Over \$200,000 | <input type="checkbox"/> Not applicable |

25. What was the total gross income generated from lodging/overnight accommodations in 2006?

- | | | |
|-------------------------------------------------|-----------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$9,999 | <input type="checkbox"/> \$10,000 to \$24,999 |
| <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$50,000 to \$99,999 | <input type="checkbox"/> \$100,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$200,000 | <input type="checkbox"/> Over \$200,000 | <input type="checkbox"/> Not applicable |

26. What was the total gross income generated from all other non-wine sales (not included in questions 22-25) in 2006?

- | | | |
|-------------------------------------------------|-----------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$9,999 | <input type="checkbox"/> \$10,000 to \$24,999 |
| <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$50,000 to \$99,999 | <input type="checkbox"/> \$100,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$200,000 | <input type="checkbox"/> Over \$200,000 | <input type="checkbox"/> Not applicable |

Please flip over to page 4



Section #3 – Business Expenses

Fixed Winery & Vineyard Expenses: These are capital items that can be depreciated on your taxes. These include both long term (land) and intermediate (equipment, tractors) assets.

27. How many dollars in total have you spent on capital investments/improvements during the past five years for your vineyard operation (tractor, land, etc)?

- | | | |
|-------------------------------------------------|-------------------------------------------------|------------------------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> under \$50,000 | <input type="checkbox"/> \$50,000 to \$99,999 |
| <input type="checkbox"/> \$100,000 to \$149,999 | <input type="checkbox"/> \$150,000 to \$199,999 | <input type="checkbox"/> \$200,000 to \$249,999 |
| <input type="checkbox"/> \$250,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$400,000 | <input type="checkbox"/> over \$400,000 (please estimate, _____) |
| <input type="checkbox"/> Not applicable | | |

28. How many dollars in total do you anticipate spending on capital investments/improvements during the NEXT five years for your vineyard operation (tractor, land, etc)?

- | | | |
|-------------------------------------------------|-------------------------------------------------|------------------------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> under \$50,000 | <input type="checkbox"/> \$50,000 to \$99,999 |
| <input type="checkbox"/> \$100,000 to \$149,999 | <input type="checkbox"/> \$150,000 to \$199,999 | <input type="checkbox"/> \$200,000 to \$249,999 |
| <input type="checkbox"/> \$250,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$400,000 | <input type="checkbox"/> over \$400,000 (please estimate, _____) |
| <input type="checkbox"/> Not applicable | | |

29. How many dollars in total have you spent on capital investments/improvements during the past five years for your winery (bottling equipment, barrels, stainless tanks, winery expansion, etc)?

- | | | |
|-----------------------------------------------------|-----------------------------------------------------|--------------------------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> under \$50,000 | <input type="checkbox"/> \$50,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$499,999 | <input type="checkbox"/> \$500,000 to \$999,999 |
| <input type="checkbox"/> \$1,000,000 to \$1,999,999 | <input type="checkbox"/> \$2,000,000 to \$4,000,000 | <input type="checkbox"/> over \$4,000,000 (please estimate, _____) |
| <input type="checkbox"/> Not applicable | | |

30. How many dollars in total do you anticipate spending on capital investments/improvements during the NEXT five years for your winery (bottling equipment, barrels, stainless tanks, winery expansion, etc)?

- | | | |
|-----------------------------------------------------|-----------------------------------------------------|--------------------------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> under \$50,000 | <input type="checkbox"/> \$50,000 to \$149,999 |
| <input type="checkbox"/> \$150,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$499,999 | <input type="checkbox"/> \$500,000 to \$999,999 |
| <input type="checkbox"/> \$1,000,000 to \$1,999,999 | <input type="checkbox"/> \$2,000,000 to \$4,000,000 | <input type="checkbox"/> over \$4,000,000 (please estimate, _____) |
| <input type="checkbox"/> Not applicable | | |

Variable Winery & Vineyard Expenses: These are the annual VARIABLE costs incurred by the winery and vineyard. A good place to locate these costs is on your 2006 tax statements.

31. Please estimate how much was spent on wages for vineyard employees in 2006.

- | | | |
|-------------------------------------------------|-------------------------------------------------|------------------------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$9,999 | <input type="checkbox"/> \$10,000 to \$29,999 |
| <input type="checkbox"/> \$30,000 to \$74,999 | <input type="checkbox"/> \$75,000 to \$99,999 | <input type="checkbox"/> \$100,000 to \$199,999 |
| <input type="checkbox"/> \$200,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$399,999 | <input type="checkbox"/> over \$400,000 (please estimate, _____) |
| <input type="checkbox"/> Not applicable | | |

32. How much did you spend for variable expenses in 2006 for your vineyard operation? (These costs include: chemicals, fertilizers, gasoline, fuel, custom machinery hire, farm insurance, property taxes, trucking, fuel, repairs/maintenance, supplies, and utilities that can be found on your Schedule F tax form.)

- | | | |
|-------------------------------------------------|-------------------------------------------------|------------------------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> under \$49,999 | <input type="checkbox"/> \$50,000 to \$99,999 |
| <input type="checkbox"/> \$100,000 to \$149,999 | <input type="checkbox"/> \$150,000 to \$199,999 | <input type="checkbox"/> \$200,000 to \$249,999 |
| <input type="checkbox"/> \$250,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$399,999 | <input type="checkbox"/> over \$400,000 (please estimate, _____) |
| <input type="checkbox"/> Not applicable | | |

33. Please estimate how much your winery business spent in wages for winery employees in 2006.

- | | | |
|-------------------------------------------------|-------------------------------------------------|------------------------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$9,999 | <input type="checkbox"/> \$10,000 to \$29,999 |
| <input type="checkbox"/> \$30,000 to \$74,999 | <input type="checkbox"/> \$75,000 to \$99,999 | <input type="checkbox"/> \$100,000 to \$199,999 |
| <input type="checkbox"/> \$200,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$399,999 | <input type="checkbox"/> over \$400,000 (please estimate, _____) |
| <input type="checkbox"/> Not applicable | | |

Please turn to page 5



34. How much did you spend for variable expenses in 2006 for the winery? (These costs could include: bulk or bottled wine, purchased grapes, lab and processing supplies, marketing, utilities, transportation, insurance, property taxes, tasting room supplies, food, winery gift items, legal/accounting fees, packaging.)

- | | | |
|-----------------------------------------------------|-----------------------------------------------------|-------------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> \$1 to \$49,999 | <input type="checkbox"/> \$50,000 to \$99,999 |
| <input type="checkbox"/> \$100,000 to \$149,999 | <input type="checkbox"/> \$150,000 to \$199,999 | <input type="checkbox"/> \$200,000 to \$249,999 |
| <input type="checkbox"/> \$250,000 to \$299,999 | <input type="checkbox"/> \$300,000 to \$399,999 | <input type="checkbox"/> \$400,000 to \$499,999 |
| <input type="checkbox"/> \$500,000 to \$599,999 | <input type="checkbox"/> \$600,000 to \$749,999 | <input type="checkbox"/> \$750,000 to \$999,999 |
| <input type="checkbox"/> \$1,000,000 to \$2,499,999 | <input type="checkbox"/> \$2,500,000 to \$5,000,000 | <input type="checkbox"/> Not applicable |

35. Please estimate the percentage of your total annual expenditures that are made with Ohio businesses?

- | | | | |
|-------------------------------------------|-------------------------------------------|--------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> 1 to 9 percent | <input type="checkbox"/> 10 to 19 percent | <input type="checkbox"/> 20 to 29 percent |
| <input type="checkbox"/> 30 to 39 percent | <input type="checkbox"/> 40 to 49 percent | <input type="checkbox"/> 50 to 59 percent | <input type="checkbox"/> 60 to 69 percent |
| <input type="checkbox"/> 70 to 79 percent | <input type="checkbox"/> 80 to 89 percent | <input type="checkbox"/> 90 to 100 percent | <input type="checkbox"/> Not applicable |

Section #4 – Future Operational Issues and Concerns

36. Do you have a written estate plan for your operation?

- ☐ Yes If yes, in what year was it written? _____ ☐ No

37. Is a plan in place to transfer your business to the next generation upon your retirement or death?

- ☐ Yes, a family member will be taking over.
☐ Yes, a non-family member will be taking over.
☐ No, I do not know who will take over my operation.
☐ Other, please explain _____

38. Do you plan to sell or transfer your winery operation within the next five years?

- ☐ Yes ☐ No ☐ Maybe ☐ Not applicable

39. Do you plan to sell or transfer your vineyard operation within the next five years?

- ☐ Yes ☐ No ☐ Maybe ☐ Not applicable

40. What public utility services run adjacent to your winery or vineyards?

- ☐ Sewer ☐ Water ☐ Electricity ☐ Cable ☐ None

41. Are there any abandoned vineyards within one mile of any of your vineyards?

- ☐ Yes ☐ No ☐ Not applicable

42. Have any vineyards been removed or developed for housing within 1 mile of your operation during the past five years?

- ☐ Yes ☐ No ☐ Not applicable

43. Have you experienced any negative impact due to housing construction near your vineyard during the past five years?

- ☐ Yes (please explain) _____
☐ No
☐ Not applicable

44. Have you sold any of your land for development during the past five years?

- ☐ Yes ☐ No ☐ Not applicable

45. Have you planted any new vineyards in the past five years?

- ☐ Yes If yes, how many acres? _____ What varieties? _____
☐ No
☐ Not applicable

Please flip over to page 6



46. Do you anticipate planting any new vineyards in the NEXT five years?

- ☐ Yes If yes, how many acres? _____ What varieties? _____
☐ No
☐ Not applicable

47. Would you consider renovating, expanding, or establishing a vineyard if a statewide vine grant program was offered?

- ☐ Yes ☐ No ☐ Uncertain

48. Have you had any experiences with zoning or other state and/or local regulations which have affected the achievement of your business goals?

- ☐ Yes (please explain) _____
☐ No

49. If you ever wanted to sell your vineyard operation, which statements do you believe would best describe you and/or your family? (Check all that apply.)

- ☐ May the highest bidder win.
☐ I will only sell the vineyard to someone who will keep it as a vineyard operation.
☐ I would prefer to see it remain as a vineyard but would sell to the highest bidder if I can get more money from a housing developer than a grower.
☐ Other, please explain _____
☐ Not applicable—do not own a vineyard

50. Would you take a lower price for your vineyard operation if it meant the land would stay as a vineyard and not be used for development?

- ☐ Yes ☐ No ☐ Uncertain ☐ Not applicable

51. Would you consider compensation for preserving and protecting your vineyard property from development?

- ☐ Yes ☐ No ☐ Uncertain ☐ Not applicable

52. Please check your top three areas of concern in regard to your business.

- | | | | | |
|--------------------------------------|--------------------------------------|------------------------------------|-------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Competition | <input type="checkbox"/> Costs | <input type="checkbox"/> Employees | <input type="checkbox"/> Finance | <input type="checkbox"/> Information |
| <input type="checkbox"/> Management | <input type="checkbox"/> Regulations | <input type="checkbox"/> Taxes | <input type="checkbox"/> Technology | <input type="checkbox"/> Public Service |

53. What are your biggest concerns about the future of your operation?

Thank you for taking time to complete this survey.
Please return in the enclosed envelope!

Contact David Marrison at 440-576-9008 or marrison.2@osu.edu with any questions. Check out the following web page for collective survey results. <http://ashtabula.osu.edu/ag/ag.htm>
Results will be posted by January 1, 2008

This survey code is used for mailing purposes only. All information will be confidential and will be summarized and reported on a regional basis. All identifying codes will be removed once the survey is recorded.

Mailing Label sticker with
survey code here

Ohio Grape & Wine Survey 2007

The Economic Impact of the Ohio Grape Industry

The Ohio State University Extension, Ohio Wine Producers Association and Lake County Soil & Water Conservation District would like to thank you for your participation in this study which is examining the economic contributions of the Ohio grape and wine industry. Results of this survey will help our industry understand the total economic impact that we have in our state and local communities. Please note that individual survey results will not be shared with others, only collective results (by region and state) will be published. We thank you for taking time to complete this survey!

Section #1 – Demographic, Labor, & Historical Data

1. In what region of Ohio is your vineyard operation located? (See the attached map for region descriptions.)

- ☐ Northeast Ohio (If checked, are you located in Ashtabula, Lake or Geauga County? ☐ Yes ☐ No)
☐ Northwest Ohio
☐ Southeast Ohio
☐ Southwest Ohio

2. What is the age of the principal manager(s) of your business?

- | | | | | | | | |
|------------|-------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|----------------------------------|-----------------------------------------|
| Manager #1 | <input type="checkbox"/> < 30 | <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49 | <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60-69 | <input type="checkbox"/> over 69 | |
| Manager #2 | <input type="checkbox"/> < 30 | <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49 | <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60-69 | <input type="checkbox"/> over 69 | <input type="checkbox"/> Not applicable |
| Manager #3 | <input type="checkbox"/> < 30 | <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49 | <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60-69 | <input type="checkbox"/> over 69 | <input type="checkbox"/> Not applicable |
| Manager #4 | <input type="checkbox"/> < 30 | <input type="checkbox"/> 30-39 | <input type="checkbox"/> 40-49 | <input type="checkbox"/> 50-59 | <input type="checkbox"/> 60-69 | <input type="checkbox"/> over 69 | <input type="checkbox"/> Not applicable |

3. What is the business structure of your vineyard operation?

- ☐ Sole proprietor ☐ Partnership ☐ Limited liability company ☐ Corporation

4. How did you acquire your vineyard?

- ☐ Started the vineyard ☐ Purchased the vineyard ☐ Inherited the vineyard

5. In what year was your vineyard operation established? _____ ☐ Not applicable

6. Estimate how many people visit your business each year.

- | | | | |
|-------------------------------------------|--------------------------------------------|---------------------------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> 1 to 499 | <input type="checkbox"/> 500 to 999 | <input type="checkbox"/> 1,000 to 4,999 |
| <input type="checkbox"/> 5,000 to 9,999 | <input type="checkbox"/> 10,000 to 24,999 | <input type="checkbox"/> 25,000 to 39,999 | <input type="checkbox"/> 40,000 to 49,999 |
| <input type="checkbox"/> 50,000 to 74,999 | <input type="checkbox"/> 75,000 to 100,000 | <input type="checkbox"/> over 100,000 (estimate number _____) | |

7. How many family members assist with the vineyard operation?

- | | | | | |
|-----------------------------------|-----------------------------------|----------------------------------------------------------------|-----------------------------------|-----------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> 1 to 5 | <input type="checkbox"/> 6 to 10 | <input type="checkbox"/> 11 to 15 | <input type="checkbox"/> 16 to 20 |
| <input type="checkbox"/> 21 to 25 | <input type="checkbox"/> 26 to 30 | <input type="checkbox"/> over 30 (if over 30, how many? _____) | | <input type="checkbox"/> Not applicable |

8. How many non-family employees do you employ to work in the vineyard operation?

- | | | | | |
|-----------------------------------|-----------------------------------|----------------------------------------------------------------|-----------------------------------|-----------------------------------------|
| <input type="checkbox"/> Zero | <input type="checkbox"/> 1 to 5 | <input type="checkbox"/> 6 to 10 | <input type="checkbox"/> 11 to 15 | <input type="checkbox"/> 16 to 20 |
| <input type="checkbox"/> 21 to 25 | <input type="checkbox"/> 26 to 30 | <input type="checkbox"/> over 30 (if over 30, how many? _____) | | <input type="checkbox"/> Not applicable |

9. Please indicate the benefits you offer your employees (check all that apply).

- | | | |
|-------------------------------------------------|-------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Medical insurance | <input type="checkbox"/> Dental insurance | <input type="checkbox"/> Stock or ownership options |
| <input type="checkbox"/> Retirement plan (401K) | <input type="checkbox"/> Eye insurance | <input type="checkbox"/> Do not provide any benefits |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Not applicable | |

Please flip over to page #2



Section #2 – Wine & Grape Production

10. Please indicate the number of acres of grapes raised and the average price received.

Type of Grape	Acres Raised	2006 Yield (ton/acre)	Price Received per ton for 2006 crop	Average Yield (ton/acre) for the past five years (actual or anticipated for 2002-2006)	Average Price received per ton for the past five years (2002-2006)
Juice		t/a	\$	t/a	\$
Juice grapes sold for wine production		t/a	\$	t/a	\$
Table grapes		t/a	\$	t/a	\$
Hybrid wine varieties		t/a	\$	t/a	\$
Vinifera wine varieties		t/a	\$	t/a	\$

Section #3 – Business Expenses

Fixed Vineyard Expenses: These are capital items that can be depreciated on your taxes. These include both long term (land) and intermediate (equipment, tractors) assets.

11. How many dollars in total have you spent on capital investments/improvements during the past five years for your vineyard operation (tractor, land, etc)?

- ☐ Zero ☐ under \$50,000 ☐ \$50,000 to \$99,999
☐ \$100,000 to \$149,999 ☐ \$150,000 to \$199,999 ☐ \$200,000 to \$249,999
☐ \$250,000 to \$299,999 ☐ \$300,000 to \$400,000 ☐ over \$400,000 (please estimate, _____)
☐ Not applicable

12. How many dollars in total do you anticipate spending on capital investments/improvements during the NEXT five years for your vineyard operation (tractor, land, etc)?

- ☐ Zero ☐ under \$50,000 ☐ \$50,000 to \$99,999
☐ \$100,000 to \$149,999 ☐ \$150,000 to \$199,999 ☐ \$200,000 to \$249,999
☐ \$250,000 to \$299,999 ☐ \$300,000 to \$400,000 ☐ over \$400,000 (please estimate, _____)
☐ Not applicable

Variable Vineyard Expenses: These are the annual VARIABLE costs incurred by vineyard. A good place to locate these costs is on your 2006 tax statements.

13. Please estimate how much was spent on wages for vineyard employees in 2006.

- ☐ Zero ☐ \$1 to \$9,999 ☐ \$10,000 to \$29,999
☐ \$30,000 to \$74,999 ☐ \$75,000 to \$99,999 ☐ \$100,000 to \$199,999
☐ \$200,000 to \$299,999 ☐ \$300,000 to \$399,999 ☐ over \$400,000 (please estimate, _____)
☐ Not applicable

14. How much did you spend for variable expenses in 2006 for your vineyard operation? (These costs include: chemicals, fertilizers, gasoline, fuel, custom machinery hire, farm insurance, property taxes, trucking, fuel, repairs/maintenance, supplies, and utilities that can be found on your Schedule F tax form.)

- ☐ Zero ☐ under \$49,999 ☐ \$50,000 to \$99,999
☐ \$100,000 to \$149,999 ☐ \$150,000 to \$199,999 ☐ \$200,000 to \$249,999
☐ \$250,000 to \$299,999 ☐ \$300,000 to \$399,999 ☐ over \$400,000 (please estimate, _____)
☐ Not applicable

Please turn to page 3



15. Please estimate the percentage of your total annual expenditures that are made with Ohio businesses?

- ☐ Zero ☐ 1 to 9 percent ☐ 10 to 19 percent ☐ 20 to 29 percent
☐ 30 to 39 percent ☐ 40 to 49 percent ☐ 50 to 59 percent ☐ 60 to 69 percent
☐ 70 to 79 percent ☐ 80 to 89 percent ☐ 90 to 100 percent ☐ Not applicable

Section #4 – Future Operational Issues and Concerns**16. Do you have a written estate plan for your operation?**

- ☐ Yes If yes, in what year was it written? _____ ☐ No

17. Is a plan in place to transfer your business to the next generation upon your retirement or death?

- ☐ Yes, a family member will be taking over.
☐ Yes, a non-family member will be taking over.
☐ No, I do not know who will take over my operation.
☐ Other, please explain _____

18. Do you plan to sell or transfer your vineyard operation within the next five years?

- ☐ Yes ☐ No ☐ Maybe ☐ Not applicable

19. What public utility services run adjacent to your vineyards?

- ☐ Sewer ☐ Water ☐ Electricity ☐ Cable ☐ None

20. Are there any abandoned vineyards within one mile of any of your vineyards?

- ☐ Yes ☐ No ☐ Not applicable

21. Have any vineyards been removed or developed for housing within 1 mile of your operation during the past five years?

- ☐ Yes ☐ No ☐ Not applicable

22. Have you experienced any negative impact due to housing construction near your vineyard during the past five years?

- ☐ Yes (please explain) _____
☐ No
☐ Not applicable

23. Have you sold any of your land for development during the past five years?

- ☐ Yes ☐ No ☐ Not applicable

24. Have you planted any new vineyards in the past five years?

- ☐ Yes If yes, how many acres? _____ What varieties? _____
☐ No
☐ Not applicable

25. Do you anticipate planting any new vineyards in the NEXT five years?

- ☐ Yes If yes, how many acres? _____ What varieties? _____
☐ No
☐ Not applicable

Please flip over to page 4



26. Would you consider renovating, expanding, or establishing a vineyard if a statewide vine grant program was offered?

- ☐ Yes ☐ No ☐ Uncertain

27. Have you had any experiences with zoning or other state and/or local regulations which have affected the achievement of your business goals?

- ☐ Yes (please explain) _____
☐ No

28. If you ever wanted to sell your vineyard operation, which statements do you believe would best describe you and/or your family? (Check all that apply.)

- ☐ May the highest bidder win.
☐ I will only sell the vineyard to someone who will keep it as a vineyard operation.
☐ I would prefer to see it remain as a vineyard but would sell to the highest bidder if I can get more money from a housing developer than a grower.
☐ Other, please explain _____
☐ Not applicable—do not own a vineyard

29. Would you take a lower price for your vineyard operation if it meant the land would stay as a vineyard and not be used for development?

- ☐ Yes ☐ No ☐ Uncertain ☐ Not applicable

30. Would you consider compensation for preserving and protecting your vineyard property from development?

- ☐ Yes ☐ No ☐ Uncertain ☐ Not applicable

31. Please check your top three areas of concern in regard to your business.

- | | | | | |
|--------------------------------------|--------------------------------------|------------------------------------|-------------------------------------|-----------------------------------------|
| <input type="checkbox"/> Competition | <input type="checkbox"/> Costs | <input type="checkbox"/> Employees | <input type="checkbox"/> Finance | <input type="checkbox"/> Information |
| <input type="checkbox"/> Management | <input type="checkbox"/> Regulations | <input type="checkbox"/> Taxes | <input type="checkbox"/> Technology | <input type="checkbox"/> Public Service |

32. What are your biggest concerns about the future of your operation?

Thank you for taking time to complete this survey.
Please return in the enclosed envelope!

Contact David Marrison at 440-576-9008 or marrison.2@osu.edu with any questions. Check out the following web page for collective survey results. <http://ashtabula.osu.edu/ag/ag.htm>
Results will be posted by January 1, 2008

This survey code is used for mailing purposes only. All information will be confidential and will be summarized and reported on a regional basis. All identifying codes will be removed once the survey is recorded.

Mailing Label sticker with survey code here

WINE LOVER SURVEY

Date: _____ Time: _____ Winery: _____ Survey Number: _____

Tell us about how you enjoy wine.

1. What is your favorite wine? ☐ Red.... Or.... ☐ White ☐ Sweet.... Or.... ☐ Dry

Varietal _____ Winery/Producer _____

2. Are the wineries the primary purpose for your visit? ☐ Yes ☐ No

3. How many wineries do you plan to visit in the region on this trip? _____

4. Would you like to share which wineries you plan to visit besides this one? (If yes, use addendum sheet.)

☐ Yes ☐ No

5. What is the most you have ever paid for a bottle of wine? _____

6. Please indicate the number of times you have visited wineries in the past 5 years:

☐ In the Ashtabula, Geauga and Lake Tri-County area _____

☐ Other parts of Ohio _____

☐ In the East Coast _____

☐ In the Midwest _____

☐ In the West Coast _____

☐ Out of the Country _____ Where? _____

7. Have you ever participated in a wine festival or wine event not held on a winery premises? ☐ Yes ☐ No

If yes, what and where? _____

8. Where do you typically purchase wine? (Check all that apply.)

☐ Winery ☐ Grocery ☐ Beverage Store ☐ Restaurant ☐ On Line

9. How often do you drink wine?

☐ Daily ☐ Weekly ☐ One or two times per month ☐ < Once per month

10. How many glasses of wine do you plan to purchase on premises this trip? _____ Bottles? _____

11. How many bottles of wine do you plan to take home? _____ What is the average bottle price? _____

Tell us about this visit.

12. Including yourself, how many people are in your travel party? # of children: _____ # of adults: _____

13. Tell us the gender and age range of the members of your party.

Yourself: ☐ Male ☐ Female ☐ Under 30 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ 70+

Person 2: ☐ Male ☐ Female ☐ Under 30 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ 70+

Person 3: ☐ Male ☐ Female ☐ Under 30 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ 70+

Person 4: ☐ Male ☐ Female ☐ Under 30 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ 70+

14. How did you hear about our local wineries?

☐ I live in Ashtabula, Geauga or Lake ☐ I visit frequently ☐ I read an article in a newspaper or magazine

☐ I heard an advertisement on the radio/TV ☐ They were recommended by family/friends

More about this visit...

15. What prompted you to make this visit?

- ☐ Information at the Welcome Center ☐ Wine Trail Event ☐ Organized Activity ☐ We stopped on a whim
☐ We're bringing friends ☐ Other: please specify _____

16. Is this an overnight trip? ☐ No (If No, skip to question #19.) ☐ Yes: How many nights? _____

17. Is the trip that you are currently on a: (Check one)

- ☐ Business Trip ☐ Vacation Trip ☐ 1-3 Day Getaway ☐ Trip to visit friends or relatives ☐ Other: _____

18. If yes, where are you staying?

- ☐ Private Residence ☐ Hotel ☐ Lodge or Conference Center ☐ B&B ☐ Boat ☐ Campground ☐ Other

19. Please estimate the expenditure for purchases your party has made at the wineries you have visited.

- ☐ Wine purchases _____ ☐ Gift Shop _____ ☐ Food _____ ☐ Other _____

20. What other attractions have you visited or do you plan to visit on this trip?

- ☐ Local Museums ☐ Cultural Events ☐ Historic Site ☐ Nature Activities ☐ Shopping ☐ Amusement Facilities
☐ Golf ☐ Farm Market ☐ Other: _____

21. Please estimate the expenditure for purchases your party has made or plans to make on this trip.

- ☐ Local Museums _____ ☐ Cultural Events _____ ☐ Historic Site _____ ☐ Nature Activities _____
☐ Shopping _____ ☐ Amusement Facilities _____ ☐ Golf _____ ☐ Farm Market _____ ☐ Other _____

22. In what type of vehicle are you traveling?

- ☐ Car/Van ☐ Motor Coach ☐ Bicycle ☐ Motorcycle ☐ Recreational Vehicle/Motor Home ☐ Cab/Shuttle ☐ Other

23. What meals have you eaten or do you plan to eat in Ashtabula, Geauga or Lake Restaurants? (Indicate number of meals for the group)

- ☐ Breakfast _____ ☐ Lunch _____ ☐ Dinner _____

24. Did you buy fuel for this trip in Ashtabula, Geauga or Lake?

- ☐ Yes (Indicate number of times tank was filled) _____ ☐ No

25. As a consumer, what would you like to find at the wineries that is not currently offered?

Would you mind sharing a few demographics with us?

26. Zip code of your permanent address: _____

27. What is your household income before taxes?

- ☐ < \$25,000 ☐ \$25,000 - \$49,999 ☐ \$50,000 - \$74,999 ☐ \$75,000 - \$99,999 ☐ \$100,000 - \$149,999 ☐ \$150,000+

28. Of which ethnic or racial group are you a member?

- ☐ Caucasian ☐ Asian ☐ African American ☐ Hispanic ☐ Other: (Please specify.) _____

29. What is the highest level of education you have completed?

- ☐ Grade School ☐ High School ☐ Some College/Tech School ☐ Bachelors Degree
☐ Some Post Grad Work ☐ Masters ☐ Doctorate

The Northeast Ohio Grape & Wine
Economic Impact Study
November 2008

