



School of Business and Economics

Summary Report Survey on Community Perceptions of Wine Businesses

Updated August 10, 2018

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School of Business and Economics – Sonoma State University

Topline Summary

2018 Survey on Community Perceptions of Wine Businesses Sonoma State University School of Business and Economics

Residents in our survey of North Bay wine-producing counties (Sonoma, Napa, Lake, Mendocino, and Solano) hold mostly positive views of wine businesses (vineyards and wineries) in their area.

74% have either Very Positive (39%) or Positive (35%) views compared with 4% who have either Very Negative (1.4%) or Negative views (2.6%). 22% have Neutral views or No Opinion about them.

As was the case in the 2015 survey we conducted for SSU's School of Business and Economics, respondents repeatedly cited jobs, boosting the local economy, increasing tourism, adding beauty, culture, and a positive image to the region, and giving back to the community as benefits wine businesses bring to the region.

The current survey also included questions regarding the quality of life in their county, as well as what impacts last year's fires had on them, and the role that vineyards and wineries played in helping to deal with those impacts.

The majority of respondents viewed the quality of life in their county in positive terms. A favorable climate, small town atmosphere, the beauty of the region, and available recreational activities were often mentioned as to why they liked living in their county.

Solano County residents often stated the convenience its location offered as well the relative affordability of homes there as positives of living in their area.

Respondents by a 68.5% to 11% margin felt that wine businesses contribute to rather than detract from the rural character of their county. 20.4% were not sure or had no opinion about this.

Sonoma and Napa County residents in particular often mentioned the cost of living particularly for housing costs as well as increased traffic and congestion as to what they disliked about life in their county or area.

A significant number of respondents indicated they had been impacted in one or more ways by last year's devastating fires.

Among those whose homes were destroyed or incurred significant damage from the fires, a majority indicated that government agencies and their insurance companies were either helpful or very helpful in helping them deal their impacts.

Residents in all five counties held mostly positive views of the role vineyards and wineries played in helping local residents deal with the impacts of the fires.

In summary, the data and verbatim comments suggest as they did in the 2015 survey that most North Bay residents see wine businesses as a significant community asset, in economic terms, as a source of local pride, and as enjoyable for visitors and residents alike.

The survey of 503 residents of these counties was conducted online in February and March of this year. See [About This Survey](#) for more details.

Potential Next Steps

Future periodic surveys regarding community perceptions of wine businesses should be helpful in assessing, maintaining, and potentially expanding public support. Deeper dives into how wine businesses could specifically help address community concerns and needs would likely be productive.

Although public impressions of the role vineyards and wineries played in helping deal with the 2017 North Bay wildfires were largely positive, a significant number of residents was not sure or had no opinion about this. Efforts to increase public awareness of these resources could be very valuable to residents given the dire outlook for future fire seasons.

Another area of potential future research for which little is publicly known is how those who were the most seriously impacted by the fires are doing now and what their most important needs are. Such a survey could be done in conjunction with local government agencies and should provide a wealth of valuable information for both fire victims and their elected representatives.

Summary of Key Findings
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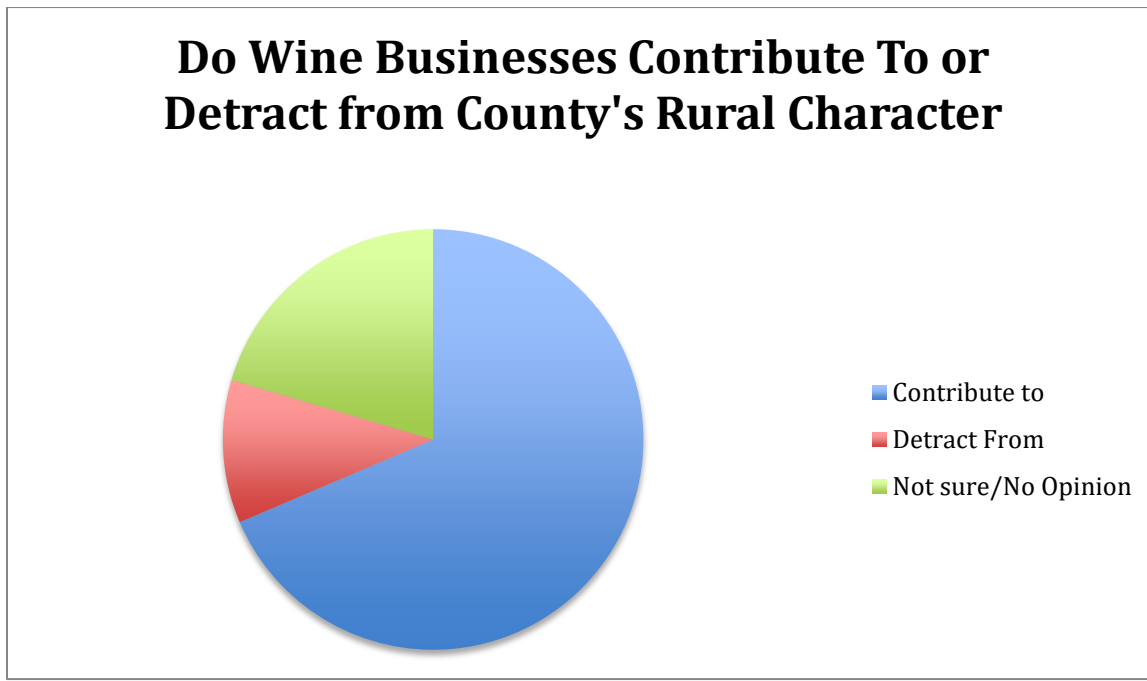
Image of Wine Businesses and the County Where They Live

- Most North Bay residents have a positive opinion about the quality of life in their county with 71% describing it as either excellent (28.4%) or good (43%). 15.2% said it was average, 9% fair and 3.8% poor;
- 35% said they considered themselves more of a resident of the city or area rather than the county (24.5%) they lived in. 37.3% said they considered themselves residents of both equally;
- A large majority 74% said they had either a very positive (39%) or positive (35%) opinion of wine businesses (Vineyards and Wineries) in their area. Only 4% who expressed either a negative (2.6%) or very negative (1.4%) view of them. 22% held neutral views or no opinion about them;



- Large majorities said they felt wine businesses contributed to their county in a variety of ways:
 - 66.5% said they contributed a great deal to bringing more people to visit their county;
 - 58.8% said they contributed a great deal to boosting the local economy;
 - 57.8% said they contributed a great deal to the beauty and culture of the region;

- Large numbers of respondents were more likely to say that wine businesses contributed some rather than a great deal in the following ways:
 - 50.8% said they added some rather than a great deal (20.4%) to traffic and congestion;
 - 40.8% said they contributed some rather than a great deal (27.9%) to giving back to the community
 - 39.2% said they contributed some rather than a great deal (28.4%) to serving as greenbelts that separate cities in their county;
- Equal numbers of respondents (36%) said they contributed some or a great deal to increasing the cost of living in their county;
- More than two out of three respondents (68.5%) said that most wine businesses contributed to the rural character of their county compared with 11% who said they detracted from it. 20.4% were not sure or had no opinion about this;

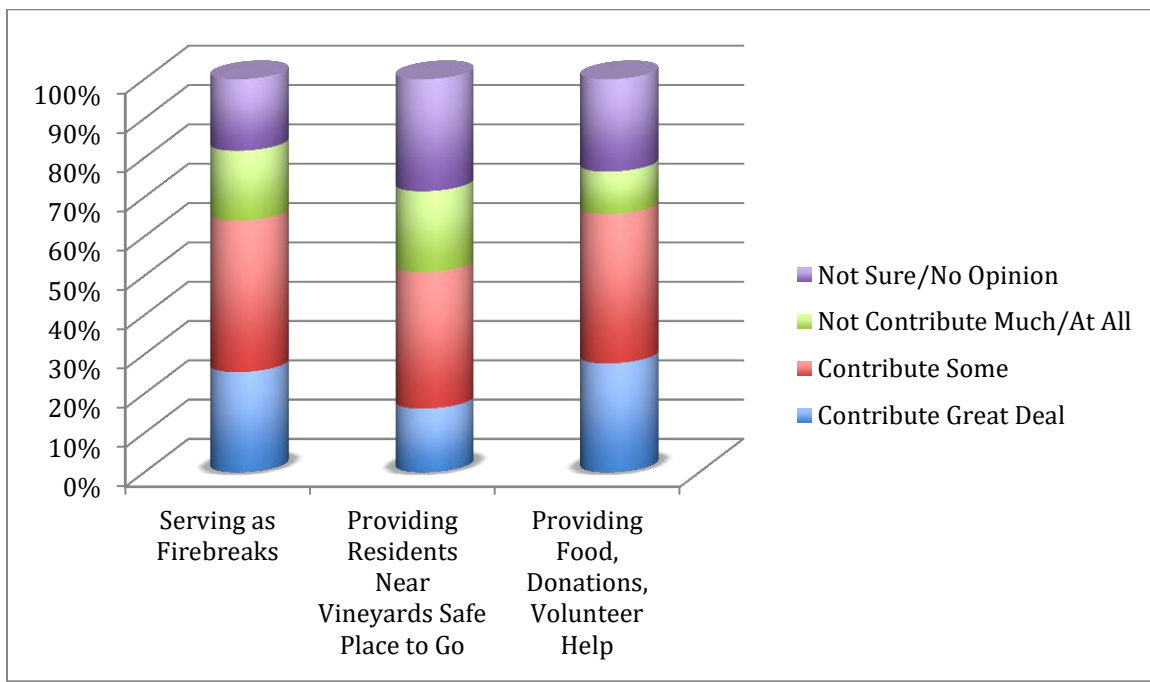


- 48.4% said they thought most wine businesses are responsive to community concerns compared with 19.1% who feel they are not responsive in this regard. 32.5% were not sure about this;
- 32.7% said they enjoy wine on a regular basis, 20.8% said they drink wine periodically, 19.2% once in a while or on special occasions, and 26% said they rarely or never consume it.

The North Bay Fires

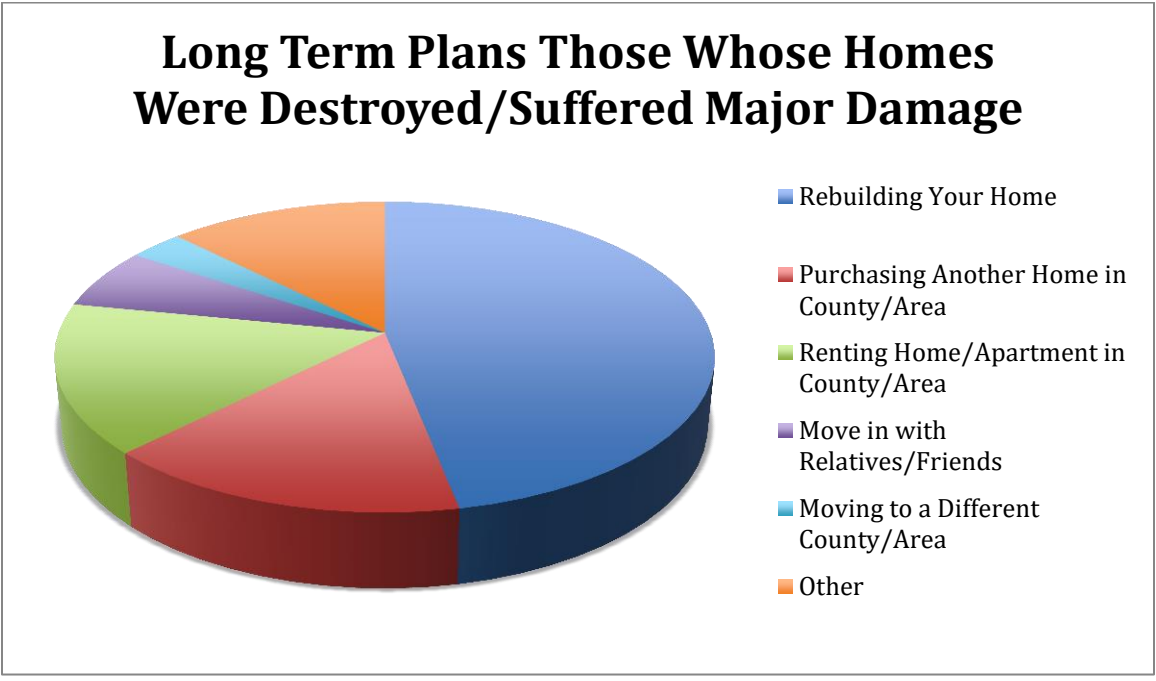
- A majority of respondents said they felt vineyards and wineries played a positive role in helping to deal with North Bay Fires in the following ways:
 - 64% said they contributed either some (38.5%) or a great deal (25.5%) in serving as firebreaks that helped prevent the fires from spreading further or more rapidly;
 - 65.7% said they contributed either some (38%) or a great deal (27.7%) to providing food, donations, and volunteer services to help victims recover from the fire;
 - 51% said they contributed either some (34.7%) or a great deal (16.2%) to providing residents who lived near vineyards with a safe place to go;

Role of Vineyards and Wineries in Dealing With 2017 North Bay Wildfires



- Half of the respondents (50%) said they were not impacted by the North Bay fires in any way; [Adds up to more than 100% due to multiple responses]
 - 7.2% said their home was either destroyed (4.4%) or suffered major damage (2.8%);
 - 4.8% said their home suffered minor damage;
 - 4% said they lost a significant amount of possessions

- 23.6% said they were forced to evacuate their home;
- 14.6% said they lost wages or business income;
- 13.4% said they were impacted in other ways;
- Those whose homes were destroyed or had major damage said their long term housing plans were as follows: *{Among those who have long-term housing plans}*
 - 46.9% - Rebuilding their home
 - 15.6% - Purchasing another home in the county/area
 - 15.6% - Renting a home or apartment in the county/area
 - 6.3% - Moving in with relatives/friends
 - 3.1% - Moving to a different county/area
 - 12.5% - Other



- 60.6% of those whose homes were destroyed or suffered major damage said that government officials had either been helpful (39.4%) or very helpful (21.2%) in dealing with the impacts of the fire. 15.2% each said they had not been helpful at all or not very helpful;
- A similar percentage (57.2%) said their insurance company had been either helpful (28.6%) or very helpful (28.6%) in dealing with the impacts of the fire. 11.4% said they had not been helpful all or not very helpful 5.7%;

About This Survey

Survey on Community Perceptions of Wine Businesses

Sonoma State University School of Business and Economics

The survey was conducted for the Wine Business Institute of the School of Business and Economics at Sonoma State University. Interviews were conducted from February 24 to March 14, 2018.

The main purpose of the survey was to determine public attitudes towards wine businesses in Sonoma, Napa, Lake, Mendocino, and Solano counties. Another major goal was to determine the ways North Bay residents were impacted by last year's fires.

Survey Scope

A total of 503 interviews were conducted in five North Bay Counties. Interviews were conducted in proportion to each county's percentage of the regional population (Sonoma 42.1%, Napa 9.5%, Lake 5.8%, Mendocino 7%, and Solano 35.6%).

The survey is most authoritative in describing the opinions of residents of each region as a whole (503) and in Sonoma (212) and Solano (179) counties where the largest number of interviews were conducted. Due to the relatively small number of interviews conducted in Napa (48), Mendocino (35), and Lake (29) counties, the results from those areas should be viewed with that in mind. This data is still helpful in understanding the generalized views of residents of those areas.

Methodology

The interviews were conducted online using respondents provided by Research Now - Survey Sampling International, a leading global provider of online and telephone samples, and other research partners. Respondents are recruited using proven processes to make them balanced and representative, control overlap, validate respondent data and provide stringent quality checks. They have opted in with rewards designed to promote engagement and motivation. Each participant is profiled on demographics, lifestyle, occupation, location and more.

All surveys, regardless of the methodology in which they are conducted, are potentially affected by a number of factors that may influence their accuracy. A common source for survey inaccuracy is sampling error. The number of respondents largely determines sampling error. Statistical theory indicates that in the case of a poll with the sample size of the five North Bay Counties (503 Total Interviews), 95 percent of the time the results of a survey of this size would be the same as interviewing the entire population of those counties give or take approximately +/- 4.5%. The margin of sampling error for the individual counties would be higher. This is not a probability sample.

However, other sources of error also can impact the accuracy of poll results conducted online and with other techniques. These include but are not limited to the percentage of the population choosing to participate, the likelihood a possible respondent is at home or connected to the Internet, the wording, and ordering of questions, and the techniques used to determine possible survey participants. The cumulative impact of all of these potential sources of error is impossible to assess precisely.