

TERRESTORIA LLC | SALT LAKE CITY

THE UTAH WINE MARKET REPORT

2019/2020 EDITION

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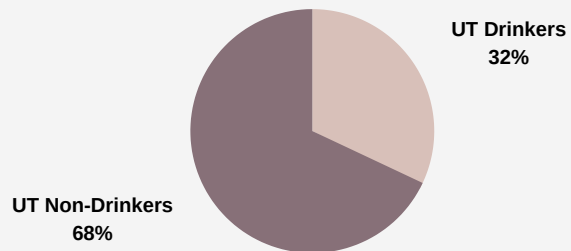
2019/2020 EDITION



PHOTO BY DORAN ERICKSON

Introduction

WHY UTAH NEEDS A WINE REPORT



Source: Behavioral Risk Factor Surveillance System

Part editorial, part industry review—*The Utah Wine Market Report* uncovers the primary reasons the Beehive State is fast becoming a haven for wine lovers.

While inquiries into consumption typically capture national and global trends, consideration of Utah's idiosyncratic wine market requires a contextualized frame of reference. Historically and culturally unique, Utah operates under the *Control Model* and plays by its own rules in business.

Through targeted research and detailed analysis, all five sections of this document offer a glimpse into the circumstances that have helped wine culture take root in Utah, while presenting applicable insights about the future.

Special thanks go to the more than 200 Utahns whose personal perspectives and experiences were recorded through the online survey that provided much of the consumer data referenced in the pages of this report.

Where There Is Progress There Is Wine

THE ECONOMY

Beverage alcohol trade media are in a frenzy over waning demand for wine across America. News about an aging population, vigorously lobbied health warnings, competing product segments, domestic oversupply and ongoing trade disputes all point to an imminent hiccup of considerable proportions in the nation's vinous economy.

There is no disputing the evident challenges that lie ahead for the U.S. wine supply chain. Instead, this report looks to Utah as a region of unheeded potential. The state's talented workforce, proclivity for innovation and pro-market mindset are engines of boundless productivity across numerous industries—from aerospace and renewable energy to outdoor products and tech—forming a prosperous ecosystem where an appreciation for wine is only natural.

While mature wine markets throughout the country, and particularly along the two coasts, are seeing the plateauing effects of market saturation and the friction-wrought conditions of the times, Utah is a largely overlooked bastion of highly educated consumers with rising discretionary income and less jaded attitudes.

Utah wine sales in
2019

+10.4%



PHOTO BY JORGE VASCONEZ



PHOTO BY NICOLE Y-C

THE ECONOMY (cont.)

As the strategic appeal of emerging markets heightens during this period of reckoning throughout top-tier channels, an alternative, if somewhat veiled, route to a captive audience of keen wine consumers exists in the form of Utah's control system agency known as the *Department of Alcoholic Beverage Control*.



TY RICHCHOUYROD

F&B MANAGER
THE GRAND AMERICA HOTEL

I have been working in Utah going on 13 years and have seen a huge change in consumers, from people asking for Moscato d'Asti to people now looking for grower Champagne. I see great potential in this market. Utah has a long way to go but it will get there. That's why I am still here and not going anywhere.

Meanwhile local political and business leaders endeavor to position Utah as nothing less than the “crossroads of the world”—illustrating the distinctly if-we-build-it-they-will-come approach so deeply entrenched in the ‘Utah Way’. Landmark infrastructure developments in the state capital such as an advanced logistics-based inland port and the completion later this year of a \$4.1 billion overhaul of Salt Lake City International Airport will conceivably only accelerate the process of steep modernization underway. It is more than reasonable to expect a gradual loosening of state liquor laws as the region magnifies its standing in the global economy.

Given that wine consumption is deemed a reliable indicator of macro-economic health, ever-expanding demand for wine in Utah seems par for the course. As U.S. wine sales by volume decreased by 0.9% last year (1), the DABC saw volumes edge up by 1.1% with a remarkable 10.4% rise in the total value of wine sold in FY 2019. (2) Poised for continued growth, Utah has emerged as a recent *Wall Street Journal* headline reads, “America’s Economic Star”. The impact of this astonishing transformation on local patterns of wine consumption is the focus of this report.

BOTTLE SPEND BY AGE AT UTAH WINE STORES



PHOTO BY @CHUTERSNAP

	21–29	30–39	40–49	50–59	60+
UNDER \$10	15%	3%	2%	*	*
\$10–\$14.99	48%	28%	26%	14%	24%
\$15–\$19.99	30%	37%	34%	36%	32%
\$20–\$29.99	7%	23%	24%	26%	36%
\$30–\$49.99	*	6%	8%	17%	4%
\$50–\$74.99	*	*	2%	5%	*
\$75 +	*	3%	4%	2%	4%

*No responses recorded for these price points.

Up, Up & Away

DEMOGRAPHICS

Ballooning demographics position Utah among the most rapidly growing states in the nation with estimates of current population numbers almost doubling by 2065 (3) not only as a result of natural increase but also due to the arrival of newcomers motivated by educational and economic opportunity. The degree to which this reality is already reshaping the local marketplace cannot be overstated as diverse patterns of behavior, preferences and income levels introduce unprecedented demands into all sectors of Utah’s fast-moving economy.

Within this dynamic scenario of relentless in-migration, Utah is and will continue experiencing profound cultural change, with a steady rise in beverage alcohol consumption serving as one of the most obvious markers. How Utah’s symbiotic relationship with *The Church of Jesus Christ of Latter-day Saints* will come to terms with this reality is impossible to determine—though the pragmatism for which Utahns are known presumably holds the answer.

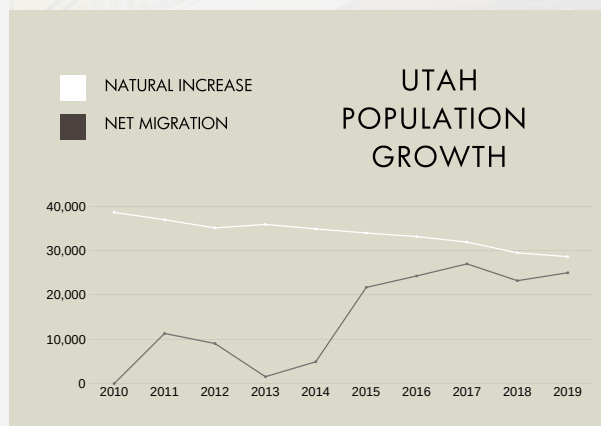
By viewing wine consumption through a localized lens is to recognize that although overarching trends—including tailwinds which propel markets forward and headwinds inflicting the opposite effect—apply to Utah as they do elsewhere, the extent to which the state mirrors the rest of the country is tempered by an inherent non-alignment with mainstream social, political and economic currents.



PHOTO BY ASHTON BINGHAM

“High net migration rates for the state of Utah are expected to continue, both for international and domestic migration. Utah continues to attract relocation projects, as well as the attention of national and global site selectors, and is primed for the best organizations and talent to bring their business to the state.”

2020 Economic Report to the Governor



Source: Kem C. Gardner Policy Institute

DEMOGRAPHICS (cont.)

63%
of wine drinkers
in Utah
also consume
beer and spirits.

While Utah's aging population, slowing birthrates and climbing religious disaffiliation all seem to parallel national tendencies, the dramatic population growth spurred by the state's attractive labor market is unexplored territory where traditional values coalesce more than ever with untethered free-market practices.

Wine economist Dr. Chris Bitter makes a pertinent observation in his blog *Vintage Economics* about the relationship between demographic change and demand for wine by considering consumption a function of both *size* and *composition* of an adult population.

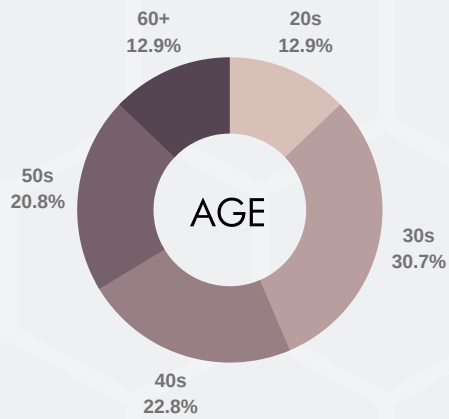
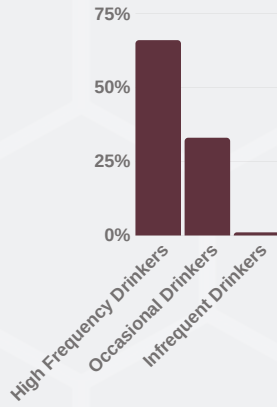
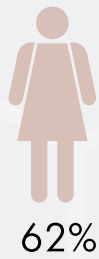
Applying Bitter's model, it is reasonable to forecast consistent growth in the volume of wine consumed in Utah well into the future as the result of migration patterns which drive diversity.

To this point, demographers estimate that half of the exponential growth projected for Utah in the next five decades will come from minority groups. (4) In light of this new cultural mix, the local wine market will not only encounter demand for higher quantities of wine but the need to supply more stylistically varied products that suit an evolving spectrum of tastes and culinary traditions.



PHOTO BY JAKE WEIRICK

THE UTAH WINE CONSUMER



Sources: The Utah Wine Market Survey 2019/2020; *Utah Department of Alcoholic Beverage Control.

Fueling Industry With Food & Drinks

STRATEGIC THINKING



PHOTO BY JAY WENNINGTON

Once only vaguely recognized as an emerging player of the Mountain West, Utah's success story as one of the strongest and most diversified economies in the country has come to serve as an international benchmark of high industrial output. With a mid-sized economy notably more diverse than even the largest states, Utah outperformed the nation's 2.9% real GDP growth in 2018 at 3.7%—a rate of growth maintained by the state economy ever since. (5) And despite potentially destabilizing external influences including an especially divisive election season and precarious world trade relations, the outlook for the year ahead remains positive in Utah—which *Forbes* has ranked the best state to start a business in 2020.

At the source of such prosperity stands a mighty framework of strategic sectors classified by the *Utah Governor's Office of Economic Development* as Aerospace and Defense; Energy and Natural Resources; Financial Services; Life Sciences; Outdoor Recreation; and Software and Information Technology—all of which have propelled the transformation of this formerly isolated region of marginal interest to outsiders into an epicenter of innovation capable of attracting serious talent and investment even from afar.

65%
of local
wine
drinkers
order wine
when
dining out.

This dynamic coming of age specifically along the Wasatch Front is paralleled at an equal pace by the emergence of new urban realities as multifaceted and diverse as the state economy itself.

Nowhere is Utah's metamorphic rise more evident than at local eating and drinking establishments which form a \$5.5 billion sector in their own right (6) while bringing immeasurable added value to every industry at work in the state economy. As the consumer-facing segment of tourism, business travel and day-to-day networking, restaurants and bars have become an integral resource for statewide enterprise.

STRATEGIC THINKING (cont.)



**For every dollar
spent at a table
service
establishment,
\$1.96 of additional
economic activity is
generated in Utah.**

Source: National Restaurant Association



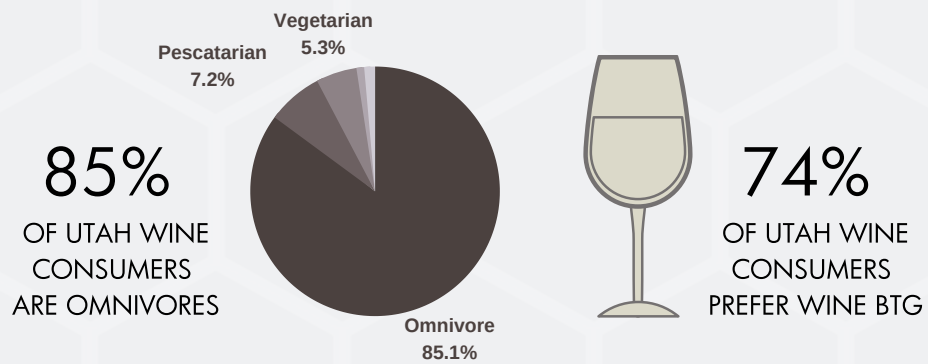
SCOTT EVANS
FOUNDER & PRESIDENT
PAGO RESTAURANT GROUP

2019 was a very challenging year for staffing, particularly in the back of house. With a surge of new openings in Salt Lake City, cooks tend to "jump ship" when desperate operators (we have all been desperate!) try and fill full teams and offer above market wages and signing bonuses. That has cooled down a little in the past four months and we have seen our work force stabilize. Our front of house teams are largely stable with the average turn over for hosts and bussers and slower turn over for servers and bartenders. Fine dining is impacted the most with new openings as trained cooks continue to be a hot commodity.

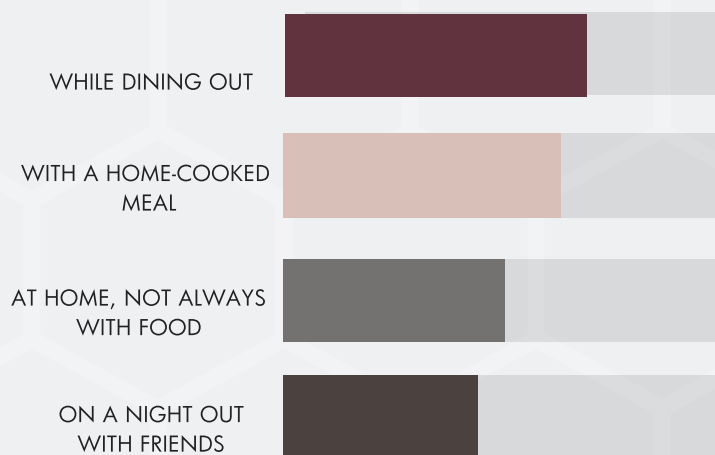
While the six state-endorsed industries or 'clusters' previously cited benefit from the active stewardship of the private and public sectors, the food and drinks economy seems to rely almost exclusively on self-starters within the business community who take action into their own hands. Yet even the boldest of independent efforts to position and promote Utah as a world-class destination for business and travel are limited in reach among new audiences.

The focus must turn to forging a group identity. As a united front, industry members such as restaurateurs, chefs, wine and spirits trade professionals, educators and local manufactures, have much to gain as the market captures onward momentum. Furthermore, greater cohesiveness among stakeholders is needed to generate creative industry pathways which cultivate the talent and workforce upon which food, drinks and hospitality companies depend. The GOED would be wise to take a closer look at this under-recognized yet unquestionably strategic arm in the hive of industry.

UTAH EATS & UTAH DRINKS



When and where Utahns enjoy wine



Source: The Utah Wine Market Survey 2019/2020

THE TOP 10
RESTAURANTS
LOCAL WINE DRINKERS LOVE



Current Fish & Oyster
SLC Provisions
Table X
Takashi
Oquirrh
White Horse
SLC Eatery
HSL
Pallet
Stanza

Source: *The Utah Wine Market Survey 2019/2020*

A Culture of Moderation

SOCIAL RESPONSIBILITY

Ask a Utahn why they live where they do and the reply will likely point to *quality of life*—those intangible benefits some attribute to their physical surroundings and habitual routines. How individuals define such virtues of geography is, of course, highly subjective, yet it goes without saying that a good job alone stops short of persuading even the most ambitious to remain in one place for long.

At the risk of over-generalizing, the enduring appeal of Utah among many of its inhabitants might be explained by feelings of work-life balance and meaningful community ties. Built on a social framework verging on the anachronistic in an ever more isolated and digitized world, Utah is still a place where people gather around the table, commune with one other and break bread. While devout teetotalers remain the established majority, this characteristically neighborly environment lends itself to time-honored traditions of varied sorts—including the appreciation of wine.

As the *Strategic thinking* section of this report reveals, Utah's food, drinks and hospitality industry is presently on an impressive upward trajectory. A vibrant culinary arts scene and numerous fine dining ventures are principal drivers of the unprecedented demand for premium wine in the local market. This newfound cosmopolitanism is most felt in Salt Lake City, home to the largest concentration of wine consumers in the state and to a gastronomic movement on equal footing with that of significantly larger metropolitan areas of the country.

Utah is a peculiar balancing act of tradition versus progress; cultural distinctiveness versus solidarity; provincialism versus globalization—the same contrasting forces with which the Old World of wine has had to perpetually contend. In either scenario, the guiding principle of moderation offers sensible solutions and, perhaps, the most practical way forward.



SOCIAL RESPONSIBILITY (cont.)

.05%

UTAH'S BAC LIMIT
FOR DRIVERS MATCHES
THAT OF THE MOST LENIENT
EUROPEAN COUNTRIES.



PHOTO BY STEFAN JOHNSON

The culture of respect inherent to wine is a shared tradition that transcends time and deserves a place in modern society. Educating imbibing consumers about the prodigious history, geography and biology of wine is the first step in moderation as greater understanding is acquired about what in fact distinguishes this agricultural product from other types of alcoholic drinks.

Thanks to public awareness campaigns such as *Wine in Moderation*, a program conceived by the European wine trade, the importance of social responsibility in wine culture is recognized the world over.

Despite that promotional activities are prohibited within the context of Utah's control system, the state has a vital role to play in advocating for social responsibility among those who drink. If sustainable progress is found in the avoidance of extremes, then perhaps the principles of mindfulness, balance and moderation—the timeless pillars of genuine wine culture—are precisely what make Utah such a fitting environment for connoisseurship.



HOW TO APPRECIATE WINE

1. Research wines to understand what makes each unique.
2. Savor the moment; drink slowly.
3. Pair with a good meal.
4. Enjoy with family and friends.
5. Avoid excess.

Wine in Moderation - Art de Vivre
www.wineinmoderation.com

Control State of Mind

FLOUTING THE TIERS

To speak of the ‘American wine market’ can be misleading given the ample latitude and high degree of self-determination granted to individual states under the 21st Amendment. It is more convenient to think of the U.S. beverage alcohol industry as a loosely connected network of fifty distinctly regulated markets, among which seventeen states as well as jurisdictions in Alaska, Maryland, Minnesota and South Dakota operate a form of the Control model whereby wine, beer and spirits are, to varying extents, government business at the wholesale level—or as in the case of thirteen of those geographic areas, including Utah, where control is also exercised over retail sales for off-premise consumption.

At first glance, the presence of a government monopoly in Utah’s otherwise staunchly free-market economy may come across as a glaring paradox. Predictably, total acceptance of state intervention in alcohol sales is rare among consumers living in a control system environment. But all too often what is lost on many are the inner workings of the broader *three-tier-system*, the federally mandated backbone of all alcohol-related business in the United States which has given rise to an increasingly consolidated middle tier of private wholesalers who dominate most beverage alcohol markets nationwide. Time and again, major mergers have reconfigured the map of alcohol distribution into expansive multi-state territories where only those giant market alliances and their biggest commercial brands can compete.



PHOTO BY KONZEL CREATIVE



PHOTO BY KELSEY CHANCE

FLOUTING THE TIERS (cont.)

At present, the nation's two top distributors Southern Glazer's Wine & Spirits and RNDK/Young's Market Co. are telling examples: together reporting \$27 billion in annual wine sales, which amount to more than half of the domestic wine consumed in one year across the country.(7)

In spite of Utah's reputation for unparalleled business forwardness, this is one area in which the state conducts its affairs quite differently. Answering directly to a legislature mainly populated by members of the LDS Church, the DABC has no apparent mandate to profit from the sales of products from which the religious are expected to abstain. However, the control system is equipped to supply virtually any product for which there is demand, including wines from small and mid-sized producers who find it more and more difficult to secure traditional market distribution. Utah may be an outlier of the American three-tier-system, but beverage alcohol is a booming state enterprise with wine sales alone nearing the \$164 million mark in FY 2019. (8)



TANNER LENART
ATTORNEY
CHRISTENSEN & JENSEN

There's going to be another liquor bill this legislative session (2020) which is supposed to be a "clean up" and not an overhaul, so it will be interesting to see what makes it in there. Looking further ahead – if we get the Olympics, there's a chance we could see some entertainment districts established, or other possible loosening of service. I'm looking ahead to 2030 already!

FLOUTING THE TIERS (cont.)



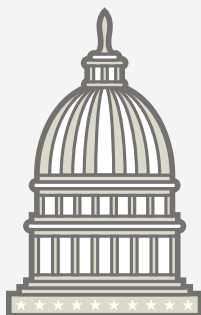
Cultural idiosyncrasies aside—or perhaps by virtue of them—the Utah wine market is a compelling experiment in doing business according to an organic system in lieu of assimilation to standardized ways. By sitting on the sidelines of large-tier distribution, valuable lessons can be learned and strategically applied even within the context of state bureaucracy.

Today’s consumers crave innovation; they value experience, provenance and authenticity over brand power; and they feel entitled to expressing their opinions. Utah’s control system is only partially

equipped to meet those needs and—short of a legislative breakthrough—will continue to operate below the market’s true potential.

Change never comes soon enough for those who wrangle with the status quo, while others are ostensibly caught off guard by pressures to adapt to change. Finding the middle ground will take time and common sense to negotiate. Yet if the overall record of the past decade is any indication of the future for beverage alcohol in Utah, then the groundwork for a leaner, more sensible business model is most likely already in place.

WINE-RELATED BILLS TO TO WATCH IN 2020



HB 157

Sponsored by Rep. Michael McKell of Spanish Fork, this bill proposes a wine order and home delivery service through the DABC, which would allow Utah residents to order wines from out-of-state producers.

SB 103

Sponsored by Sen. Gene Davis of Salt Lake City this bill proposes a wine subscription system by which consumers could order wines from registered vendors by paying a state a handling fee in lieu of 88% markup, with deliveries made to state-run liquor stores, not homes.



PHOTO BY RACHEL MARTIN

WHAT UTAHNS THINK ABOUT SHOPPING FOR WINE IN UTAH

3.2



How do state wine store selections stack up?

THE SPECIAL ORDER SYSTEM



A free online service which enables state residents to purchase products that are distributed in the U.S. but not stocked or listed by the Utah Department of Alcoholic Beverage Control.



THE UTAH WINE BUYER WISH LIST



1. *Special order tracking*
2. *Home deliveries*
3. *Access to DtC wine clubs*

83%

OF UTAH WINE CONSUMERS HAVE NEVER PLACED A SPECIAL ORDER.

Concluding Thoughts

THE MESSAGE FROM UTAH



Looking back on *The Utah Wine Market Survey* conducted in December 2019 for the purposes of this report, it is heartening to have witnessed the galvanizing effects of one simple call to action. Notwithstanding the possible controversy of characterizing wine as if it were a grassroots movement, few other features of the human experience are a better catalyst for real dialogue and exchange. In transformative times like these, this exceptional agricultural product is an impartial record of life as it once was and as it is now. Wine connoisseurship will rise significantly in Utah as the state continues its historic ascent as a global player. And legislators will eventually see value in vesting the DABC with the authority it needs to implement innovations that enhance consumer experience. Though such forecasts are mere estimates of future developments, the conclusions expressed herein are supported by survey data, anecdotal evidence, and consideration of local and external factors.

While much of the country finds itself in a holding pattern over demand for wine, Utah provides a hospitable marketplace for suppliers in search of emerging outlets. As this report has attempted to summarize, the state is both economically and culturally ready for further expansion in the wine sector.

The relationship between net-migration and wine sales by volume also reveals how population increase and resulting demographic shifts drive wine demand while bringing additional growth to Utah's highly diversified spread of industries—among which *food, drinks and hospitality* will emerge as an increasingly strategic unit.

But beneath the running narrative of sweeping progress and inexorable change, Utah is a place where acts of preservation—of ideals, community and nature—are the greatest source of inspiration. It is in this system of enduring values that the notions of responsibility, moderation and tradition inherent to wine culture find kindred accommodation.

At the time of this writing, two separate wine-related bills are under consideration in the state Legislature as many Utahns look on with notably disparate attitudes—ranging from curiosity and optimism to cynical resignation. In an ever more pluralistic society where precedents do not always exist and are often conceived by necessity, the laws and policies that govern how citizens conduct their day-to-day lives can be either polarizing or edifying. Wine consumption and wine consumers have political consequences, now more than ever—in Utah and beyond.



TERRESTORIA

About Terrestoria

WINE IMPORTS FROM THE GROUND UP

Founded in Salt Lake City with satellite offices in Milan, Terrestoria Wine Imports was created to foster discovery among Utah's burgeoning community of wine enthusiasts. While focusing on lesser-known wine regions and indigenous grapes of Italy and Spain, Terrestoria partners with small-scale producers whose voices are rarely heard beyond local borders. Why Utah? Because the future of artisan wine imports depends on bringing under-explored, dynamic local economies into the fold of American beverage alcohol distribution.

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