



“ Wine Opinions ”

Capabilities Summary

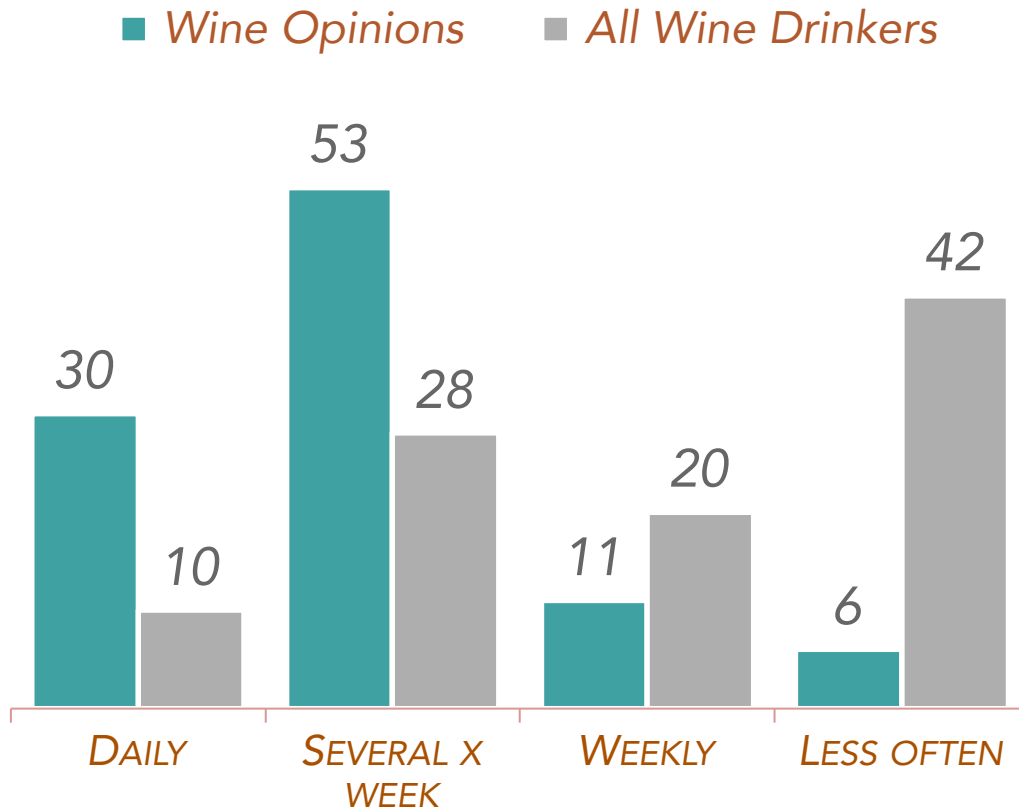
About Wine Opinions

- ✓ Leading provider of quantitative and qualitative consumer and trade research on the U.S. wine market
- ✓ Consumer panel (6,200) skews to high frequency wine drinkers, with significant group of high end wine purchasers
- ✓ Trade panel (2,100) focused on importers, distributors, on-premise, and off-premise sectors
- ✓ Commercial respondent panels, oversamples, and client-provided databases are available options
- ✓ Partnership with Wine.com to provide customer respondent pools based on purchases
- ✓ Mobile survey capabilities – tasting room or wine shop consumer intercept surveys



Consumer Panel Wine Consumption Frequency

Percent by Frequency Segment



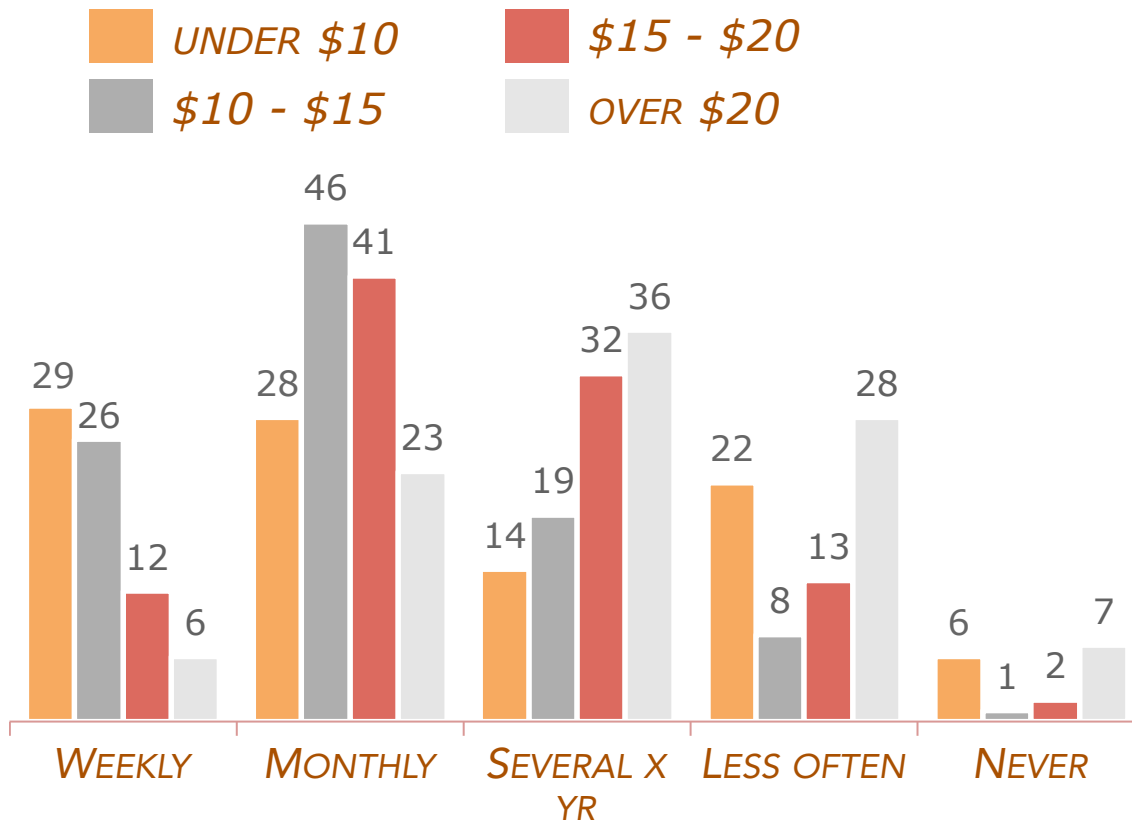
While only 38% of all U.S. wine drinkers are “high frequency” consumers, drinking wine several times a week or daily, they account for more than 85% of all wines purchased.

The Wine Opinions consumer panel is mainly comprised of “high frequency” wine drinkers (83%), giving our clients deep insights into the most important consumer segment in the U.S. wine market.



Consumer Panel by Purchase Point

Percent of WO panel purchasing by frequency and price segment (750 ml)

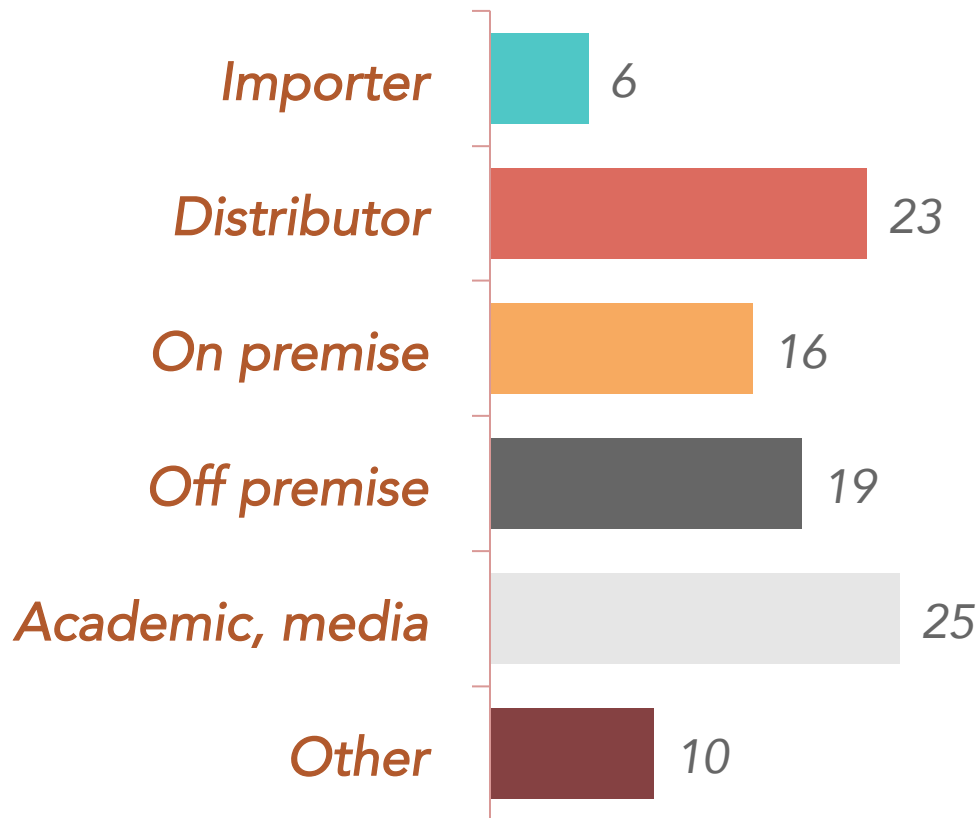


Only 11% of all wine drinkers buy wines over \$20 monthly or more often, but 29% of Wine Opinions panel members are “high end” wine buyers, who as a group are responsible for over 90% of all purchases of wines over \$20 and approximately 40% of all purchases of \$10 to \$20 wines.



Trade Panel Industry Segmentation

Percent by Segment



The Wine Opinions trade panel includes all trade segments and is nationally dispersed, with concentrations in the major metropolitan markets.

Many trade panelists are senior executives in leading companies in the wine industry, and numerous panel members are holders of MS or MW titles.



Quantitative Research

- ✓ Online surveys of consumer and trade panels (or other respondent sourcing)
- ✓ Services include baseline studies; annual tracking studies; concept, copy, message and package/label design testing; competitor comparisons and analysis; regional reporting; and evaluations of regional promotions and advertising campaigns
- ✓ Consumer survey reporting at 90% confidence level with a $\pm 2\%$ to 4% margin of error
- ✓ Trade survey reporting at 90% confidence level with a $\pm 3\%$ to 6% margin of error



Omnibus Surveys

- ✓ Wine Opinions offers “omnibus” surveys of its trade and consumer panels, bundling questions from clients to provide market insights at reduced cost
- ✓ Segmentation data is provided to participating companies (age, gender, geography, consumption frequencies, and frequency of purchase by price segment)
- ✓ Custom segmenting questions may be included
- ✓ Participating companies insert their own questions and receive full data reporting and analysis on their questions cross-tabulated to the segmentation data



Vintrospectives Discussion Groups

- ✓ Trade and consumer online discussion groups
- ✓ Preliminary online survey provides quantitative “snapshot” of key issues and selection of most qualified participants
- ✓ Three-day moderated discussion addressing key inquiry topics and probes, resulting in greater depth of inquiry and follow-up
- ✓ Client monitoring provided, as well as complete analysis and reporting
- ✓ Superior to in-person or online focus groups in terms of cost and insights gained



Vintrospectives Methodology

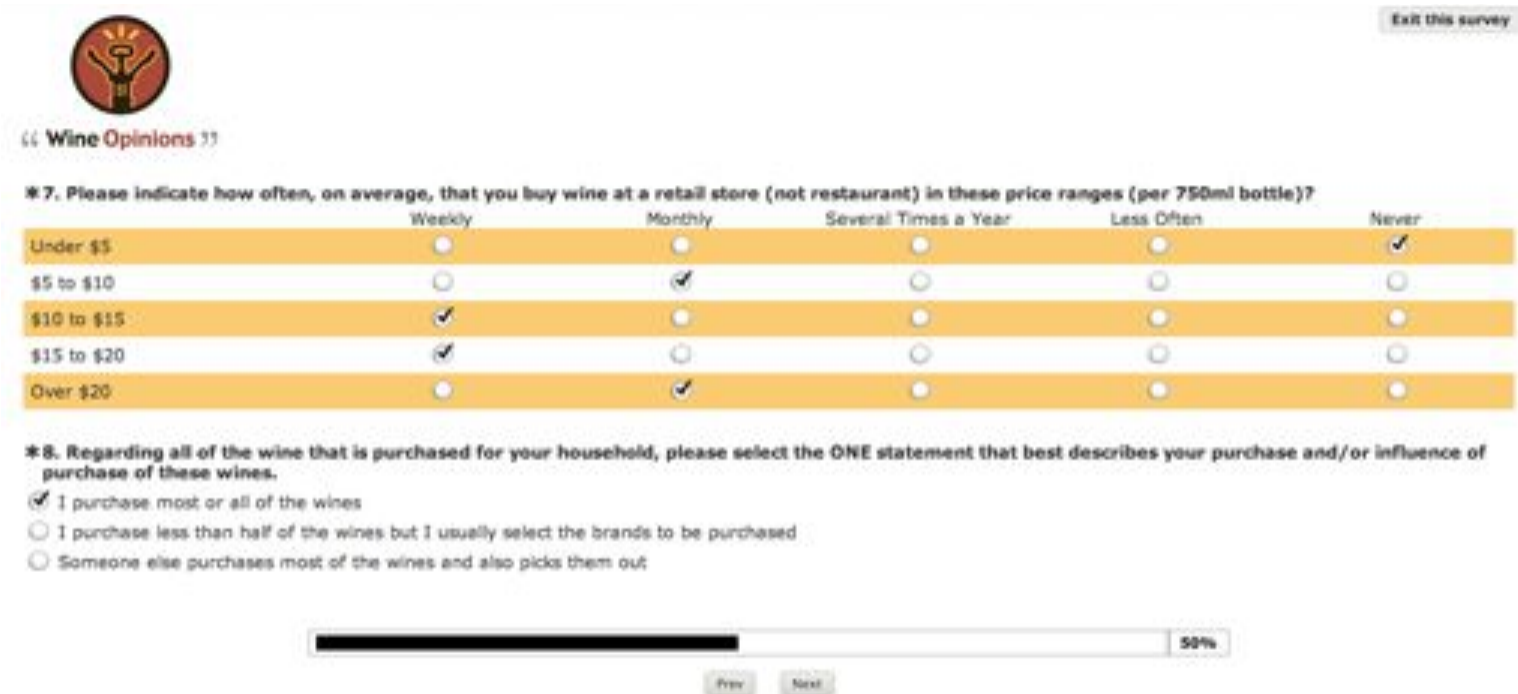
Determination of participant qualifications (sample from a recent client project)

- ✓ Over 21 years of age
- ✓ Drink wine about once a week or more often
- ✓ Buy wine costing \$15+ monthly or more often
- ✓ Purchase most or all of the wine for their household
- ✓ Buy "Brand" often or frequently/it's a favorite
- ✓ Rated "knowledgeable about wine" top 2 box on agreement scale




Vintrospectives Methodology

Screening and selection survey (questions to determine participant qualifications)



Exit this survey

 Wine Opinions

* 7. Please indicate how often, on average, that you buy wine at a retail store (not restaurant) in these price ranges (per 750ml bottle)?

	Weekly	Monthly	Several Times a Year	Less Often	Never
Under \$5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
\$5 to \$10	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$10 to \$15	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$15 to \$20	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Over \$20	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 8. Regarding all of the wine that is purchased for your household, please select the ONE statement that best describes your purchase and/or influence of purchase of these wines.


- I purchase most or all of the wines
- I purchase less than half of the wines but I usually select the brands to be purchased
- Someone else purchases most of the wines and also picks them out

Progress bar: 50%

Prev Next

Vintrospectives Methodology

Screening and selection survey (brand purchase frequency qualifying question)



Exit this survey

« Wine Opinions »

11. How many bottles (if any) of the following brands have you purchased or consumed in the past three months?

	2 bottles or more	1 bottle	None
Chateau Ste. Michelle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Covey Run	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14 Hands	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hogue Cellars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Columbia Crest - Grand Estates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Columbia Crest - Two Vines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Red Diamond	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Barefoot	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

75%

Prev Next

Vintrospectives Methodology

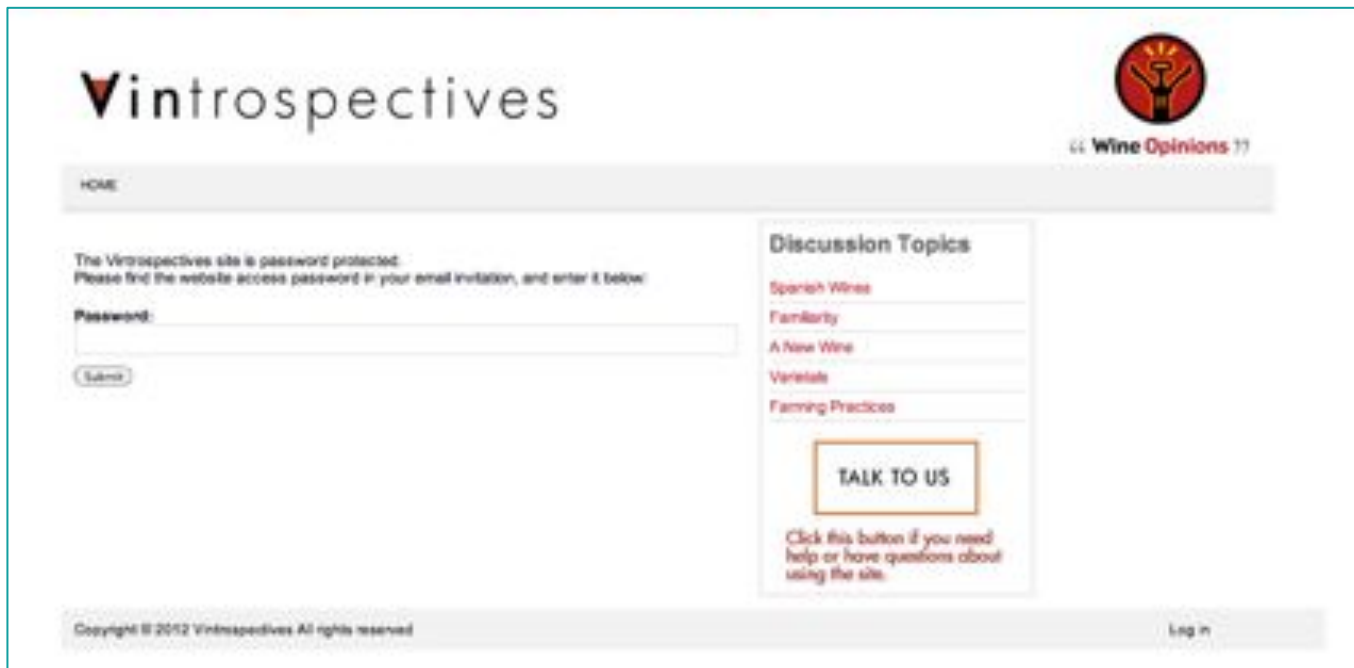
Qualified participants (hand-selected discussion group participants)

Username	Age	Gender	ST	Consumption Frequency	Buy \$15+ wines	Buy HH wine	Buy Brand	Wine Knowledge rating
LehkaD	21-34	F	CA	Daily	Monthly	Most/All	Often	1
LoisC	66+	F	CA	Daily	Monthly	Most/All	Often	1
GordonM	47-65	M	CA	Daily	Monthly	Most/All	Often	1
KelleyJ	21-34	F	TX	Daily	Weekly	Most/All	Often	1
SharonS	47-65	F	TX	Few x Wk	Monthly	Most/All	Freq/Fav	1
JackE	66+	M	TX	Few x Wk	Weekly	Most/All	Often	2
SteveW	47-65	M	WA	Daily	Weekly	Most/All	Often	2



Vintrospectives Methodology

Discussion group home page
(participants sign in and select discussion topics)



Vintrospectives

Wine Opinions

HOME

The Vintrospectives site is password protected.
Please find the website access password in your email invitation, and enter it below:

Password:

Discussion Topics

- Spanish Wines
- Family
- A New Wine
- Varietals
- Farming Practices

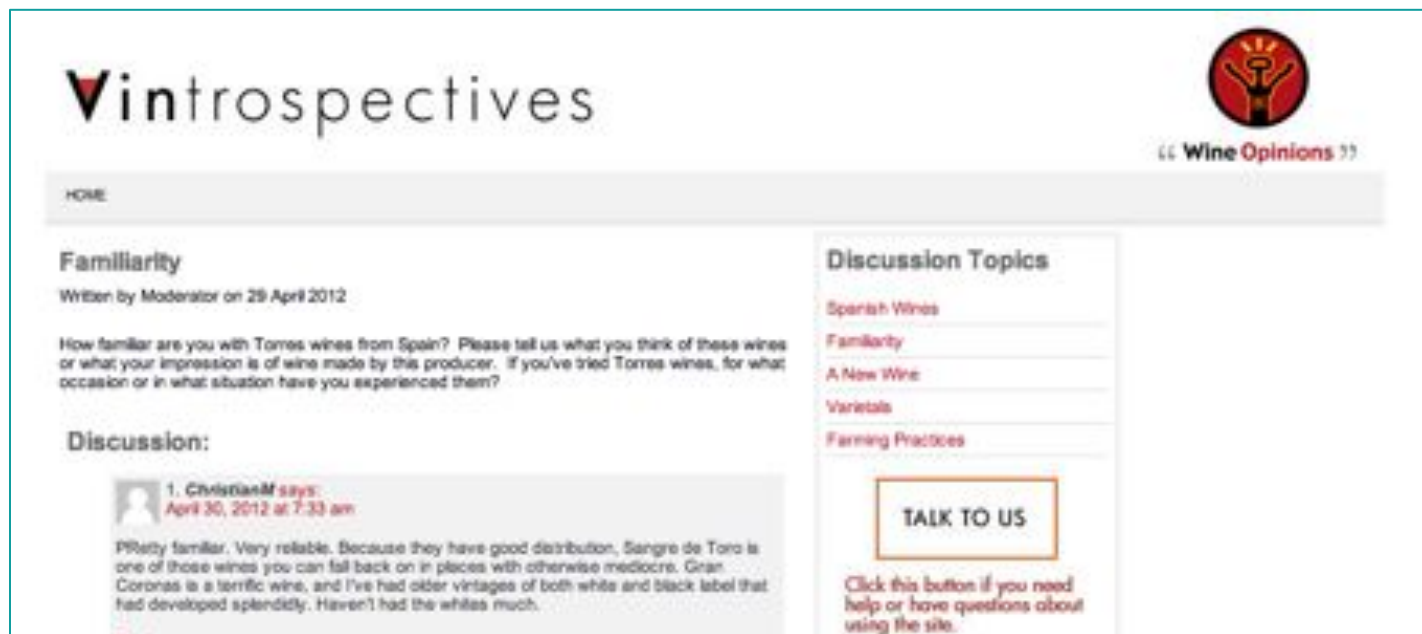
TALK TO US

Click this button if you need help or have questions about using the site.

Copyright © 2012 Vintrospectives All rights reserved.

Vintrospectives Methodology

Discussion topic commentary
(participants must comment on each topic)



The screenshot shows the Vintrospectives website interface. At the top left is the logo "Vintrospectives" with a stylized 'V' icon. At the top right is a circular logo with a hand holding a lightbulb, with the text "Wine Opinions" below it. Below the logo is a navigation bar with "HOME" highlighted. The main content area is divided into two columns. The left column features a discussion topic titled "Familiarity" written by Moderator on 29 April 2012. The text asks how familiar participants are with Torres wines from Spain and requests comments on their impressions. Below the text is a "Discussion:" section with a comment from "ChristianM" dated April 30, 2012 at 7:33 am. The comment states that Torres wines are familiar and reliable, mentioning Sangre de Toro and Coronas. The right column is titled "Discussion Topics" and lists five topics: Spanish Wines, Familiarity, A New Wine, Varietals, and Farming Practices. At the bottom of this column is a "TALK TO US" button with a call to action: "Click this button if you need help or have questions about using the site."

Vintrospectives Methodology

Moderator probes

(participants discuss between themselves and/or the moderator)



The screenshot displays a conversation on a forum. At the top, a user named 'JenniferP' posts a message about Spanish wines. Below it, a moderator asks a specific question. Finally, 'JenniferP' responds with details about a wine she owns.

Reply

2. JenniferP says:
April 30, 2012 at 8:45 am

I tend to choose Spanish wines when I'm looking for something new to try and see Torres wines often at my local wine shop. I've tried a few and equate them with reliability.

Reply

Moderator says:
April 30, 2012 at 8:43 am

JenniferP - Can you name which Torres wines you've tried?

Reply

3. JenniferP says:
April 30, 2012 at 8:46 am

I've purchased Sangre de Toro quite often. It is a wine I keep around the house for everyday drinking and pairs easily with many dishes I prepare.

Reply



Vintrospectives Methodology

Inclusion of graphic images, video, or links (participants can respond to images, videos, and more)

The screenshot displays the Vintrospectives website interface. At the top left is the logo "Vintrospectives" and at the top right is a circular logo with a hand holding a wine glass, labeled "Wine Opinions". Below the logo is a "HOME" button. The main content area is divided into three sections:

- A New Wine:** A post titled "A New Wine" written by Moderator on 29 April 2012. It asks users to look at a wine label and share their thoughts. The label shown is for "Nerola" by Torres, a Spanish wine.
- Discussion Topics:** A list of topics including Spanish Wines, Familiarity, A New Wine, Varietals, and Farming Practices. Below this list is a "TALK TO US" button with the text "Click this button if you need help or have questions about using the site."
- Discussion:** A section for user comments. It shows a comment from "1. Christianif says:" dated April 30, 2012 at 7:35 am, stating: "Quite striking. It's not a strange 'look at me' label, but modern and classy. Says 'green', something botanical and natural." Below the comment is a "Reply" button. There is also a "Leave a Reply" section with a text input field, a "Submit Comment" button, and a checkbox for "Notify me of followup comments via e-mail".

Wine Opinions Clients



Wine Opinions Executive Staff



JOHN GILLESPIE, *Founder and CEO*

John is the most recognized wine market research authority in the U.S. His career spans more than 30 years and includes leadership of Wine Market Council. He is also a Wine Colleagues founding partner.



CHRISTIAN MILLER, *Research Director*

Christian has been in the industry since 1983, and has managed research at both wineries and a CPA consulting firm. He holds a B.A. in Economics from Franklin & Marshall and an MBA from Cornell University.



JENNIFER PAGANO, *Research Associate*

Jennifer has over twenty years' experience conducting qualitative and quantitative research for food and wine companies. Jennifer is also the Director of Research for Wine Market Council.



The Wine Opinions Advantage

- ✓ The most experienced, accomplished, and recognized wine market research professionals in the U.S.
- ✓ Proprietary trade and consumer panels representative of the most important market segments and gatekeepers of the trade
- ✓ Track record of success in providing market intelligence and insights to wineries of all sizes, wine marketers, trade associations, advertising/PR agencies, and regional promotional groups
- ✓ Clients served in the U.S., Europe, South Africa, Latin America, and Australasia
- ✓ Unsurpassed capabilities of quantitative and qualitative research, including full-scale trade and consumer surveys, one-on-one interviews, online discussion groups, and research with client-provided and commercial respondent pools





“ Wine Opinions ”

Capabilities Summary