



International Wine Customer Snapshot

January 2020

Executive Summary:

This is an invitation to participate in an international study designed to investigate wine customers.

The project design involves asking wine customers in connection with an individual business through an online survey the same questions at the same time and analysing the responses.

Results will be analysed for:

1. Individual participating businesses.
2. Research groups (5 similar businesses).
3. Similar business type by country.
4. International by business type.
5. All responses.

Participation is accessed through this: **[Request to participate](#)**

Why?

Through the processes of researching my MBA thesis (Strategies for Business Development for Wineries Through Tourism), I read again and again “but we really can’t say for sure, we really don’t know the wine customer that well. They are rather complicated.”

In conversation with a winery owner of a good sized winery who I respect deeply for his insightful approach to business building, I also heard...“you know, we are finding out that we really don’t know our customers that well.”

The world is changing. FAST. Our customers have more options than ever before. A search for meaning has often replaced material goals. Experiences & personal connections are a means to find meaning.

Who are our customers NOW?

That is the question to be answered with this project. Not any wine customer. **YOUR** wine customer.

Project Design:

The project is designed to realise an international analysis of wine customers.

Asking the same questions of customers simultaneously from many different channels allows us to analyse the results based upon the following factors:

- Business & Brand
- Location

- New Demographics
- Source channel

Results are to be analysed at (3) levels:

- Business & Brand
- Research Group (similar business size & structure)
- All responses of similar customer type.

The questionnaire parameters are:

- Maximum 10 questions. Goal 5-7
- Maximum 5 minutes for completion. Goal 2:30 min.
- Electronic delivery through web address & QR code.

Results & Analysis parameters:

- Initial response collection in excel spreadsheets.
- **Individual results analysis per SWSI provided to participating business.**
- **SWSI compilation of results analysis based upon factors of location, research group and overall results provided to research group participants.**

Follow-up:

Discussion and further analysis of results within MASTERMIND groups to be facilitated by SWSI via video conference.

Company agents are invited to participate in (3) topics of conversation:

- Initial results analysis.
- Determination of strategy development & action.
- Results (what did this research bring your company?) & what further investigation would be actionable.

The Process:

2. Sign up. Send us this **Request to participate**
3. In the form, you **tell us what information about your customers would be most actionable for you.** Based upon similar business development goals, we form research groups of similar businesses.
4. SWSI develops questionnaires for each research group. This includes a “feedback round” in which you review & agree that the questions fit your brand.
5. Launch: using your business channels (email, website, social media, QR code & signage, asking from sales touch-points, etc.) you ASK your customers to answer the questionnaire. The timeframe is limited and the launch date is coordinated within your research group. The level of participation depends very much upon your asking methods. We provide guidelines to support success.
6. Results are gathered.
7. MASTERMIND discussions scheduled.
8. Analysis is performed & reports are issued.
9. MASTERMIND discussions.
10. Next steps...

The Fine Print:

Customer Access & Data Collection:

The customers in this study are **yours**. They are reached through your communication channels. The results will be separated into your customers vs. others (multiple comparisons).

Data Analysis:

Data analysis included in this study are performed and provided to you by SWSI. Access to raw data and additional analysis are possible.

Data Protection & Ownership:

Your results are confidential business intelligence. In the study, your individual results will be confidentially delivered only to you.

Your results will also be analysed in the context of your research group and all results of a similar nature. These anonymous analysis of results will be provided to you & other study participants.

SWSI will use anonymous analysis for our own business development & educational purposes.

(Example: A winery in California found that 34% of their customers have interest in joining a wine club but have never been asked. We can help you know which customers of yours want this too.)

SWSI will request specific written consent for non-anonymous data use.

Straight Talk:

Why are we doing this project?

We are new. You have no way to know how amazing it is to have your customers deliver rich and actionable marketing information to you in this way.

We want you to get to know us. We want you to experience our capabilities and to receive the wealth of INSIGHTS and marketing collateral we help you generate.

We are convinced you just need to try it to understand the VALUE that we deliver. We see this as the beginning of a rewarding long term relationship built upon similar values, innovation, and trust.

Why should you join this project?

Information is power. The wine business is competitive. It will continue to be competitive. We are in an oversupply situation.

The information that you gain by participating in this project will be actionable and give you a competitive advantage because you know your customers more intimately than ever before.

If you value this, then you are exactly right with us.

Timeline:

Beginning NOW (Jan. 2020), we are asking for participation and forming research groups. The target size for a research group is (5) businesses of similar nature. As soon as a team of (5) are collected, the process of ASKING will begin and the gathering of the next 5 similar businesses will begin.

Your recommendation and referral of colleagues from within your network will support the process of group formation. **Submit your referral here.**

Costs:

Participation in our introductory study is not without costs.

It will cost you your time & creativity to communicate within your channels to gain participation from your customers.

Most people will require some kind of motivation to participate. (Some will not, they will do it just to help you out.) This is a great opportunity to communicate (Top of Mind) and to incentivise purchasing action.

You determine the nature & cost of this motivation. We do not recommend offering discounts. We encourage you to think "win-win". Offering something that is of low cost to you but high value to your customer (think autographed bottle or early access to purchase a ticket to an exclusive dinner with your winemaker) can be very motivating.

You get it.

We are, of course, happy to provide additional analytics or direct access to your data.

We do want to begin a long term relationship that is valuable for us all.

Next Steps:

Once you submit your sign-up form we will contact you by phone. Don't worry, it won't take long. We are excited to include you!

If you have any questions please contact us.

Thank you for going on this journey with us!
We are not sure exactly what we will learn...but we know it will be good!



Be LISTENING.

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