

## Directions: Distributor Survey

The following is a step by step guide for filling out the survey that is a hypothetical participant, Test Distributor, to illustrate the process. They are a small wholesaler/distributor based in Arizona that deals in 20,000 cases of wine a year. They wish to expand their portfolio of Californian and Oregon red wines in specific ways. (At this time, Global Match is representing only these regions.)

The first section asks for *contact information*, the most important element of which is the your name and email address, as that is our primary contact for asking you questions and providing results to you.

Please fill out the following questions if you are seeking wine brands to represent. If you are looking to place wine with distributors or similar partners, please fill out the "wineries" survey.

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1 Contact Information

Name:	Wally Wholesaler
Company:	Test Distributors
Website:	www.testdist.com
Mailing Address:	456 Warehouse Way
City/Town:	Tucson
State/Province:	AZ
Zip/Postal Code:	92345
Country:	USA
Email Address:	wally@testdist.com

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2 Please check what describes your firm best:

- Distributor/Wholesaler
- Export Broker
- Importer
- Retail Account Manager
- On-Premise Account Manager

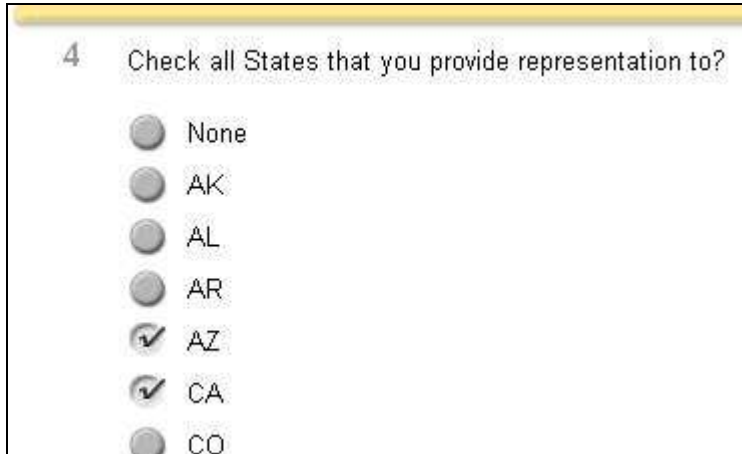
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3 How Many Cases do you purchase/move annually

- Under 1000 cases/year
- 1000 - 10000 cases/year
- 10000 - 50000 cases/year
- 50000 - 100000 cases/year

First of all, please note that this survey, while referring to participants as “distributors,” is actually for any party that is seeks wines to represent in the wholesale or retail market, either in the US or abroad. You do not have to be a distributor; for instance you could be a retailer who can purchase direct or a buyer for an on-premise account. If you are instead looking to *place* wines, take the winery survey instead, as you will otherwise be mismatched!

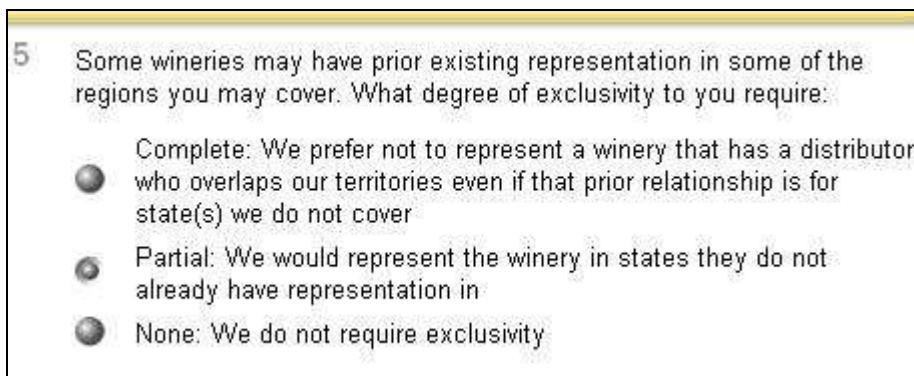
The next section is concerned with geography.. The first question asks where the firm has stateside distribution. Test Distributor is in 2 states.



4 Check all States that you provide representation to?

- None
- AK
- AL
- AR
- AZ
- CA
- CO

Prior discussions with past survey participants suggests that many firms have different policies about what degree of exclusivity they require of their winery partners. We need to make sure that you are neither 1) matched with a winery that you would feel you cannot represent nor 2) needlessly prevented from partnering with a winery because of assumed exclusivity requirements that do not apply to you. Thus we ask the following question:



5 Some wineries may have prior existing representation in some of the regions you may cover. What degree of exclusivity to you require:

- Complete: We prefer not to represent a winery that has a distributor who overlaps our territories even if that prior relationship is for state(s) we do not cover
- Partial: We would represent the winery in states they do not already have representation in
- None: We do not require exclusivity

Test Distributor has indicated they are “Partial.” This means: 1) They would not wish to represent a winery that seeks further distribution in Arizona if it already some existing Arizona distribution...2) They would be willing to represent a hypothetical winery in Arizona that may have a relationship with a “competing” California distributor.

Question 6 concerns whether or not you have representation in other countries. Test Distributor has no export potential, so they can click “none.”

The last section focuses on the wines you seek. You are allowed to specify up to 6 different inquiries for wine. Inquiries can be as specific as “Find 100 cases of Sonoma County Merlot priced between \$28 to \$30” or as broad as “Find 100 cases of any red wine or white wine from either California or Oregon priced between \$0 to \$100.” This tutorial shows three hypothetical inquiries for “Test Distributor”. 1) A search for a “luxury” pinot noir from areas renown for producing this varietal. 2) A broader search for a lower-priced “everyday” pinot noir and 3) A search for any red wine from Paso Robles.

In the first inquiry, 3 regions (counties) are selected that are famous for pinot noir. If Test Distributor was also open to seeking a pinot from a county not on the map, they would have to click “other county” for the appropriate state(s).

In this section you can specify up to 6 separate inquiries for wine that you seek. If you have fewer inquiries, you can leave subsequent entries blank.

7 For inquiry #1, please select the desired origin of the wine. You may make multiple selections. You may also select "Any California" and/or "Any Oregon " if origin is not of particular concern.

- Any-California
- Amador/Calaveras
- Lodi
- Mendocino/Lake
- Monterey/Santa Cruz
- Paso Robles
- Napa
- Santa Barbara
- Sonoma
- California-other county
- Any-Oregon
- Willamette
- Oregon-other county

For Question 8 they would select “Pinot Noir.” If they wished to also consider other varietals as well, they can select as many or as few as they want. Only the most popular

varietals grown locally are listed, but those looking for a California or Oregon Marsanne or something else off the beaten track could select “Other White.”

The next consideration is the appropriate price range that the product should retail at. You should specify both a low and a high price. While it is tempting to put “any,” be aware that there are some wineries with wines well above \$100! The more guidance you can provide, the fewer spurious matches you will have to sort through. We will not publish your exact price range parameters to anyone. In this case, “luxury” to our client means a wine that retails to the end consumer between \$25 to \$40. It is also useful if you can provide an estimate of what volume you may be able to move, as participants may seek anywhere from a few cases to a thousand times that!

9	Enter the lowest Suggested Retail Price that would be appropriate for inquiry #1	<input type="text" value="\$25"/>
10	Enter the highest Suggested Retail Price that would be appropriate for inquiry #1	<input type="text" value="\$40"/>
11	How many cases are you seeking for inquiry #1?	<input type="text" value="900"/>

The next inquiry is for an “everyday” pinot noir at a much lower price point (\$5 to \$20) from anywhere in Oregon. If the firm would also consider Pinot Grigios or any other varietals at this price point and from this location, they could provide additional checkmarks for Question 13.

- California-other county
- Any-Oregon
- Willamette
- Oregon-other county

3 For Inquiry #2 please select the varietals or blends you would consider. You may make multiple selections at the same time. If varietal or blend is not as important a criterion for you, you can select "Any\_Red" and/or "Any\_White." If you seek something not among the common varietals are listed, you can select "Other\_Red" and/or "Other\_White."

- Any\_Red
- Barbera
- Red\_Blend
- Cab\_Franc
- Cabernet\_Sauvignon
- Malbec
- Merlot
- Petite\_Sirah
- Pinot\_Noir
- Sangiovese

14 Enter the lowest Suggested Retail Price that would be appropriate for inquiry #2

\$5

15 Enter the highest Suggested Retail Price that would be appropriate for inquiry #2

\$20

16 How many cases are you seeking for inquiry #2?

1200

The last inquiry is for any red wine from Paso Robles, a small but up-and-coming California wine region in the \$10 to \$25 price range.

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- 17 For inquiry #3, please select the desired origin of the wine. You may make multiple selections. You may also select "Any California" and/or "Any Oregon " if origin is not of particular concern.

- Any-California
- Amador/Calaveras
- Lodi
- Mendocino/Lake
- Monterey/Santa Cruz
- Paso Robles
- Napa
- Santa Barbara
- Sonoma
- California-other county
- Any-Oregon
- Willamette
- Oregon-other county

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- 18 For Inquiry #3 please select the varietals or blends you would consider. You may make multiple selections at the same time. If varietal or blend is not as important a criterion for you, you can select "Any\_Red" and/or "Any\_White." If you seek something not among the common varietals are listed, you can select "Other\_Red" and/or "Other\_White."

- Any\_Red

As Test Distributor has only 3 inquiries, they can leave the rest of the survey questions blank. (There is no "end of survey" button.) If you wish to make more than 6 inquiries, email [Cholette@sfsu.edu](mailto:Cholette@sfsu.edu) with the additional information, preferably in the format as shown above.

Likewise if you are unsure if you have answered the survey correctly or have other questions or comments, please send email. Future versions of this program will utilize a more sophisticated survey, which will include participants being able to log into the database and review and update their information dynamically.