

## Directions: Winery Survey

The following is a step by step guide for completing the survey that is used to gather your information for the matching program, complete with screen shots. We have created a hypothetical participant, Test Winery, to illustrate the process. Test Winery is a small 7000 case family winery that wishes to bring their eclectic mix of products to a wider audience.

The first page is standard contact information, the most important element of which is the winery's name and email address, as that is our primary contact for asking you questions and providing results to you.

If you are a winery or wine company looking to place wine for distribution or export, please fill out the survey. If you are instead looking to represent wines, please fill out the "Distributor" survey instead.

1 Contact Information

Name:	Pat Winemaker
Company:	Test Winery
Website:	www.testwine.com
Mailing Address:	123 vineyard way
City/Town:	Sebastapol
State/Province:	CA
Zip/Postal Code:	98765
Country:	USA
Email Address:	test@testwine.com

2 What is your annual case production?

- Under 1000 cases/year
- 1000 - 5000 cases/year
- 5000 - 10000 cases/year
- 10000 - 50000 cases/year
- Over 50000 cases/year

3 Will all wines be from the same county? (If so, you only need to fill in the county once)

YES  NO

Test Winery has 4 different products they are interested in matching, not all of which are from the same county. Thus "No" is selected for Question 3.

The next section deals with geography. The first questions are concerned with the winery seeks representation. Test Winery is seeking to break into the Northeast; their first choice is New York in addition to 4 other states. Global Match has been designed to allow winemakers to target their desired market as many wineries, especially the smaller ones, may find it more advantageous to focus on a particular region, rather than overspreading marketing efforts. If a winery has narrow interests, it should select those few states. Those with broader interests can rank up to 10 states. Matches will be recommended partly on the basis of geographic fit and desirability. For example, Test Winery would be perceived as a stronger match geographically for a New York distributor than a winery who chose NY as a secondary choice, or had used all 10 slots to list potential markets. Likewise, Test Winery would be perceived as a weaker match geographically than a winery who chose only one state, NY.



The image shows a screenshot of a survey form with 10 questions. Question 4 is a text input field with the number '5' entered. Questions 5 through 10 are dropdown menus with the following selected values: NY, NJ, MA, PA, MD, and None. The form has a light blue background and a decorative border.

Question Number	Question Text	Selected Answer
4	How many states are you seeking representation in?	5
5	What state is your TOP (#1) priority to find representation in?	NY
6	What state is your #2 priority to find representation in?	NJ
7	What state is your #3 priority to find representation in?	MA
8	What state is your #4 priority to find representation in?	PA
9	What state is your #5 priority to find representation in?	MD
10	What state is your #6 priority to find representation in?	None

Questions 5 through 14 are drop down lists of states listed in alphabetic order by their 2 digit postal code. Wineries can enter “None” or leave as blank the unneeded questions. For instance, Test Winery does not need to enter any information for Questions 10-14, as they are only interested in 5 states.

Wineries are also asked to enter in which they have representation, as this information will be used to help avoid assigning wineries to partners where conflict might result between current distributors. Test Winery only has distribution in 3 states currently: Arizona, California and Colorado.

15 Please check all states that you have distribution in.

- none
- AL
- AK
- AZ
- AR
- CA
- CO
- CT

Global match also encourages wineries to consider exporting, and wineries can select as many or few export markets as desired. Test Winery has no current exports, but would consider going to both Japan and the United Kingdom. Feel free to enter a country that has not been provided in the list.

17 Select all export markets that you would seriously consider placing your wine in. Please add any countries that are not in the list

- none
- Canada
- Denmark
- France
- Germany
- Netherlands
- Switzerland
- United Kingdom
- China
- Japan
- Hong Kong
- Singapore
- S. Korea
- Mexico
- Caribbean
- Other Countries, Please Specify

18 Which countries do you currently export to?

- none

Now that geographic information has been entered, the last section deals with the actual characteristics of the wines to be matched. The winery needs to specify the products for which they seek representation. The first one that Test Winery has chosen to enter is their flagship product, a Russian River Pinot Noir that would be suggested to retail in stores for \$30. Test Winery is looking to place up to 1300 cases. They cannot specify the specific AVA (Russian River) in Question 19 directly, as this is a drop-down list by common wine production *counties*. However, they have chosen to mention this in the additional comments in Question 23. These comments are not used in the algorithm portion of the matching, but will be made available for potential partners to read.

19 Enter the origin (county) of wine #1. If the county is not listed, select "other county." If the wine does not have a county-specific origin, select "nonspecific."  
Sonoma

20 Select the varietal or blend for wine #1. If your wine is not on the list of the popular choices listed, please pick "Other\_red" or "Other\_white."  
Pinot\_Noir

21 Enter the suggested retail price per bottle (750ml equivalent) for wine #1  
\$30

22 Enter the number of cases available for allocation for wine #1  
1300

23 (Optional) Enter any additional information, such as vintage, awards or more detailed origin that might be of interest with respect to wine #1  
Russian River AVA, 92 pts Robert Parker

The next product to be entered is a Chardonnay which is also produced in Sonoma County. Thus Question 24 can either be left blank or "Sonoma" can be selected.

24 Enter the origin (county) for wine #2 if different than wine #1

25 Select the varietal or blend for wine #2. If your wine is not on the list of the popular choices listed, please pick "Other\_red" or "Other\_white."

26 Enter the suggested retail price per bottle (750ml equivalent) for wine #2

27 Enter the number of cases available for allocation for wine #2

28 (Optional) Enter any additional information, such as vintage, awards or more detailed origin that might be of interest with respect to wine #2

Their next product is a Marsanne. While popular in France, this is not a very prevalent varietal in the US. Therefore "other\_white" has been selected for Question 30, with further information provided in the comment section, Question 33.

29 Enter the origin (county) for wine #3 if different than wine #1

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30 Select the varietal or blend for wine #3. If your wine is not on the list of the popular choices listed, please pick "Other\_red" or "Other\_white."

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31 Enter the suggested retail price per bottle (750ml equivalent) for wine #3

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32 Enter the number of cases available for allocation for wine #3

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33 (Optional) Enter any additional information, such as vintage, awards or more detailed origin that might be of interest with respect to wine #3

The last wine that Test Winery has is a non-specific Californian wine. Given it is not from Sonoma, where the previous wines were all from, Question 34 must be answered. Also the product is a blend of red wines, "Red\_Blend" is entered for Question 35, with further details about the blend provided in Question 38.

34 Enter the origin (county) for wine #4 if different than wine #1  
California-nonspecific

35 Select the varietal or blend for wine #4. If your wine is not on the list of the popular choices listed, please pick "Other\_red" or "Other\_white."  
Red\_Blend

36 Enter the suggested retail price per bottle (750ml equivalent) for wine #4  
\$12

37 Enter the number of cases available for allocation for wine #4  
1500

38 (Optional) Enter any additional information, such as vintage, awards or more detailed origin that might be of interest with respect to wine #4  
2005 Kitchen Sink Red: blend of Cabernet, Syrah, Zinfandel and Merlot. 89 pts Wine Spectator.

As Test Winery has only 4 products to place, they don't have to fill out the remainder of the survey questions. Winery with more than 6 products to enter should 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 contact us. 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.