



Transforming Heritage into Legend

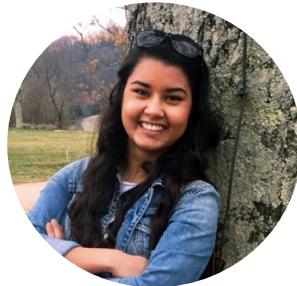
E. & J. Gallo Winery

Lauren Fogel, Joby George,
Justin Hwu, Simran Khanal
April 22, 2018

Meet the Team



Joby George



Simran Khanal



Lauren Fogel



Justin Hwu

Favorite beverage:
Old Fashioned

Favorite beverage:
Red blend

Favorite beverage:
Mojito

Favorite beverage:
Ice wine

A photograph of a rocky shoreline at dusk or dawn. The foreground is filled with large, grey, textured rocks. In the middle ground, a narrow channel of water leads to a larger body of water where a small, dark island with a dense forest is visible. The sky is a soft blue.

*Did a Russian
lake flash-freeze
a herd of horses?*

Introducing...

ICE HORSE

The Legend Lives On...



Transforming Heritage into Legend

Popularizing an ice wine
brand will drive between
\$62M and \$89M in net
revenue by year 5



Based on analytics insight, we
recommend promoting Ice Horse as a
wine cocktail lifestyle product





ICE WINE COCKTAILS

What is ice wine?

- 1 made from grapes frozen on the vine
- 2 sweeter in flavor composition
- 3 considered a dessert wine

Ice Horse is positioned well to differentiate itself

For

[consumers looking to provide a unique and memorable wine-cocktail experience to friends,]

[ICE HORSE] **is the only brand**

[among all wines, that offers a premium, customizable cocktail at a popular price]

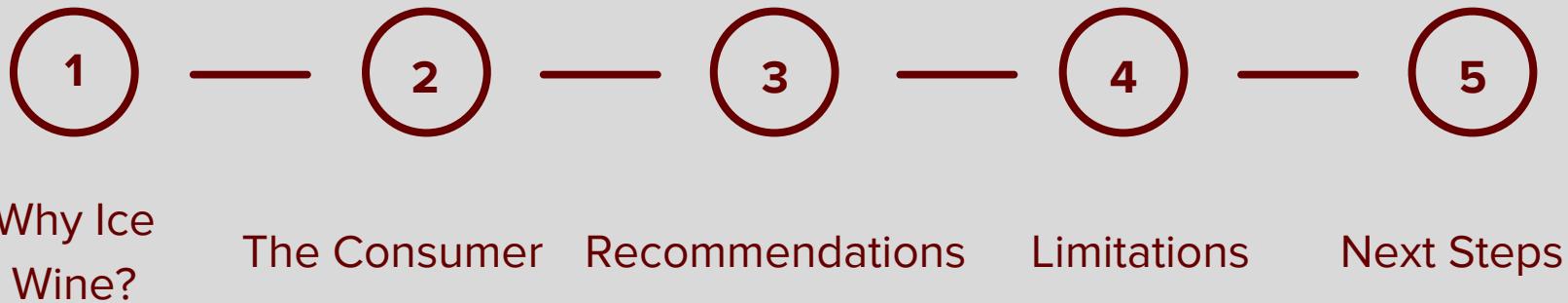
because

[it democratizes the concept of **ice wine** and targets a wine cocktail lifestyle.]

Ice Horse is positioned well to differentiate itself



Sharing our storyline





Why Ice Wine?

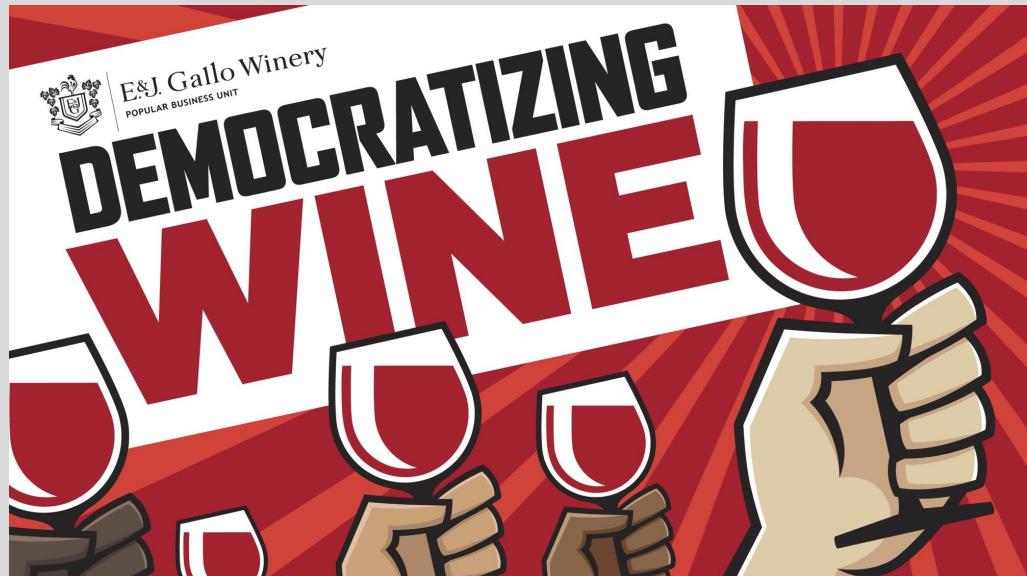


1

■ Recommendation to popularize ice wine aligns with Popular Business Unit's objective

Popular BU Objective:

“Democratize wine by amplifying strong mass market brands and building new brands with potential for scale”



Industry trends point to premiumization and self-expression

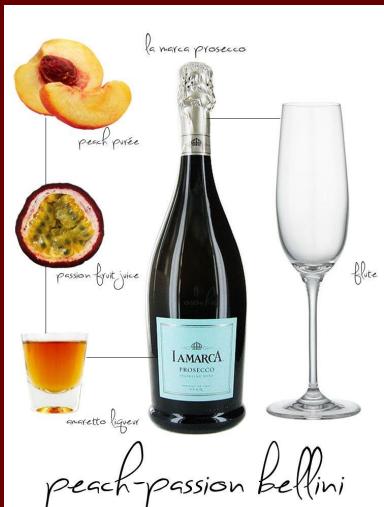
36% of
Millennials distrust
large food
manufacturers



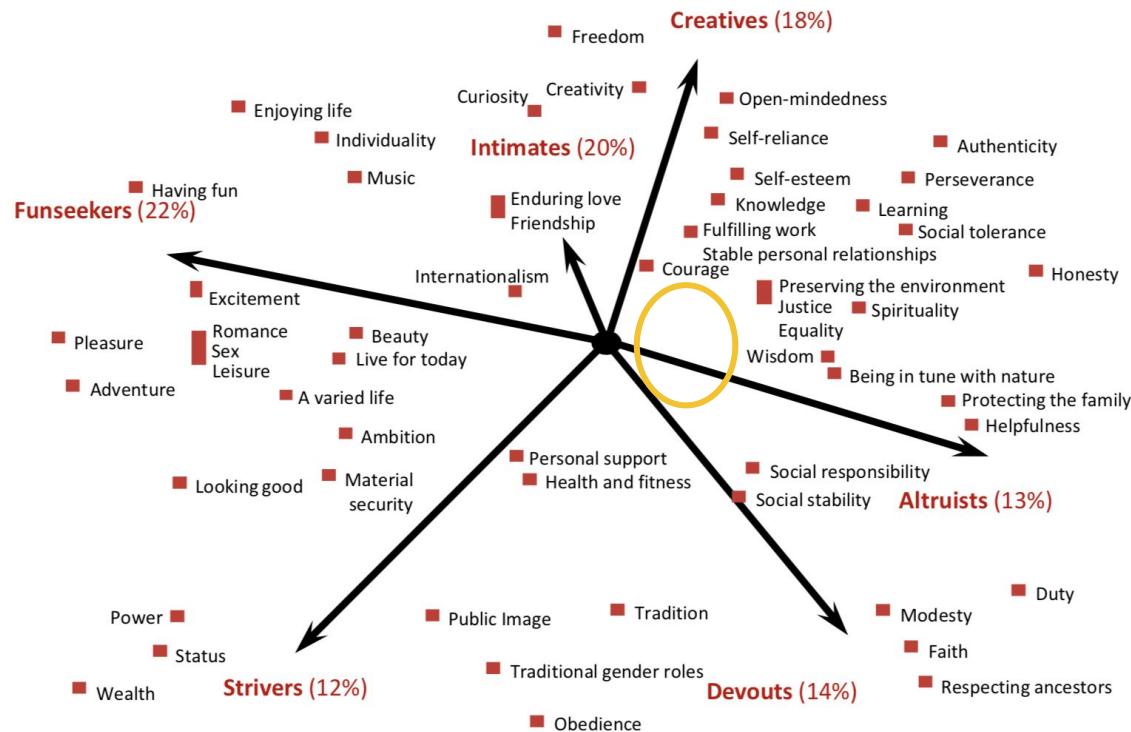
168%
increase
in US bar/restaurant
menus

Dessert wines, including Gallo brands, are already used in wine cocktails

"Vermouth has always been a partner in classic cocktails, and now millennial consumers are in the early stages of rediscovering it"



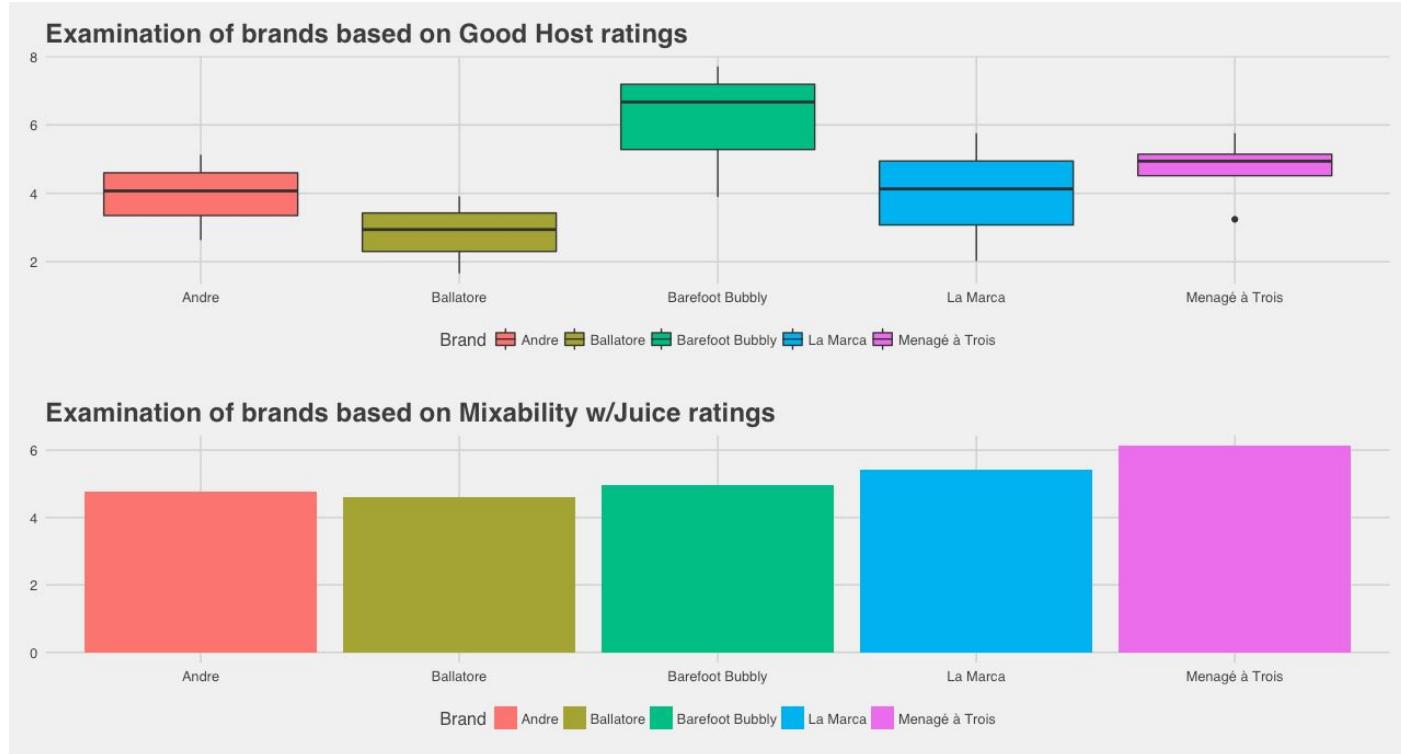
The Caregiver archetype aligns with the attitudinal values of Altruists/Creatives



Market research shows there is a white space

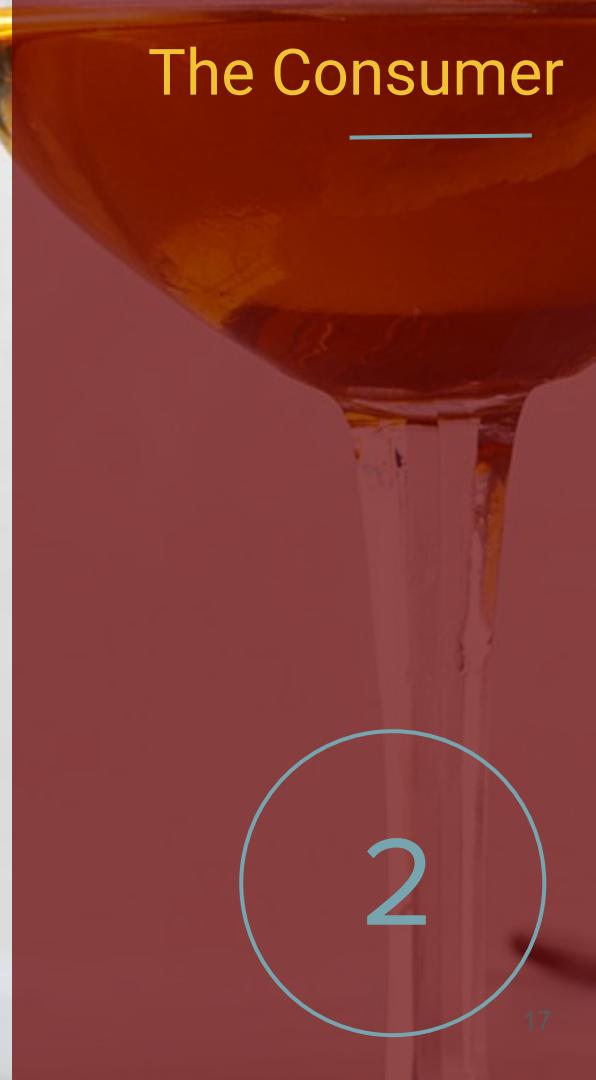


Market research shows there is a white space



A close-up photograph of a cocktail glass containing a pale yellow liquid. A large, bright yellow lemon twist is suspended above the glass by a thin wire. A small sprig of green thyme is tucked behind the lemon twist. The glass has a flared base and is set against a plain white background.

The Consumer

A close-up photograph of a glass filled with a deep red liquid, likely wine or juice. In the bottom right corner of the frame, there is a blue-outlined circle containing the number "2".

2

Social media analysis indicates ice wine appeals to men

44% of
people who
use #icewine
are men



klear

Home Influencers Campaigns Monitors

Search: Name, Skill

30 Days

Overview

Mentions

Top ice wine Mentions On 03-15-2018

Фанагория 67 my.vinotheque 58 my.vinotheque 58

my.vinotheque 58 Wineries

Ferran 58 Wineries

#FoodRulesEverythingAro... 58 Food

Pankaj Balachandra 36 my.vinotheque 58 Wineries

Filippo Gilli Tzafona Cellars

FERRAN 58 Wineries

269 1 03/15/18

269 6 03/15/18

269 1 03/15/18

219 1 03/15/18

176 9 03/15/18

269 1 03/15/18

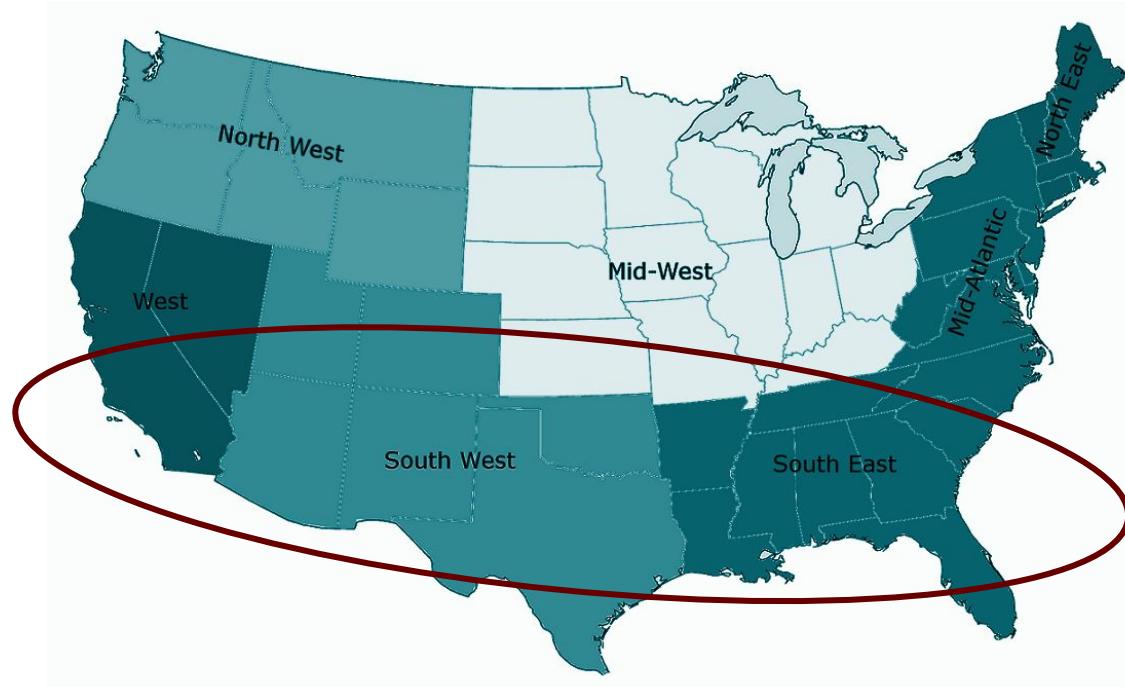
18

comScore Digital Analytics indicates potential market in the West and South

Highest spikes in web traffic of wine sites were in December, as were #icewine mentions on social media

Ice wine predominantly made and enjoyed in Upper Mid-West and Mid-Atlantic regions

Great potential for ice wine in the warmer regions of the West and South because of dessert wine and cocktail popularity in these areas



comScore provides insights into sweet wine markets

Port/sherry drinkers are:



1 Wealthy

38.2% make
\$100,000+

3 Recommenders

51.4% frequently
advise others
about food and
beverages

2 Supportive of domestic business

42.1% find it
important to
buy American
products

4 Loyal

58.7% agree that
when they find a
brand they like,
they stick to it

Vermouth drinkers are:



- Wealthy
- Mature & Established
- Also drink liquor and other cocktails
- High in customer willingness to create cocktails at home

comScore shows parallels between ice wine and rosé

Digital Analytics Insights:

- **Instagrammability** of ice wine, similar to rosé, will play an important role
- Both male and female rosé drinkers aged 21-49, making \$75,000+ displayed promising caregiver characteristics
- **Hosting/social events:**
 - **Entertaining at home** was men's top leisure activity at 35.5% and women's third highest leisure activity at 49.6%



Trey Maxham
July 15, 2018: 4:56PM

Ice Horse

5389 likes

my new favorite way to cool down this summer!
#icehorse #icewine #ejgallo #wine

K-NN cluster analysis shows four groups of Gallo consumers



Picky Pauline

Pauline is a 53-year-old, highly educated female who is married but likely has no children. Pauline is the wealthiest of the bunch. She also has very selective taste; her friends often call her: "Picky Pauline."



Barefoot Brenda

Barefoot Brenda is a 44-year-old female who is a strong supporter of the Barefoot brand. She enjoys Girls Night Out with her besties and is very carefree, enjoying life to the fullest.



Enthusiastic Emma

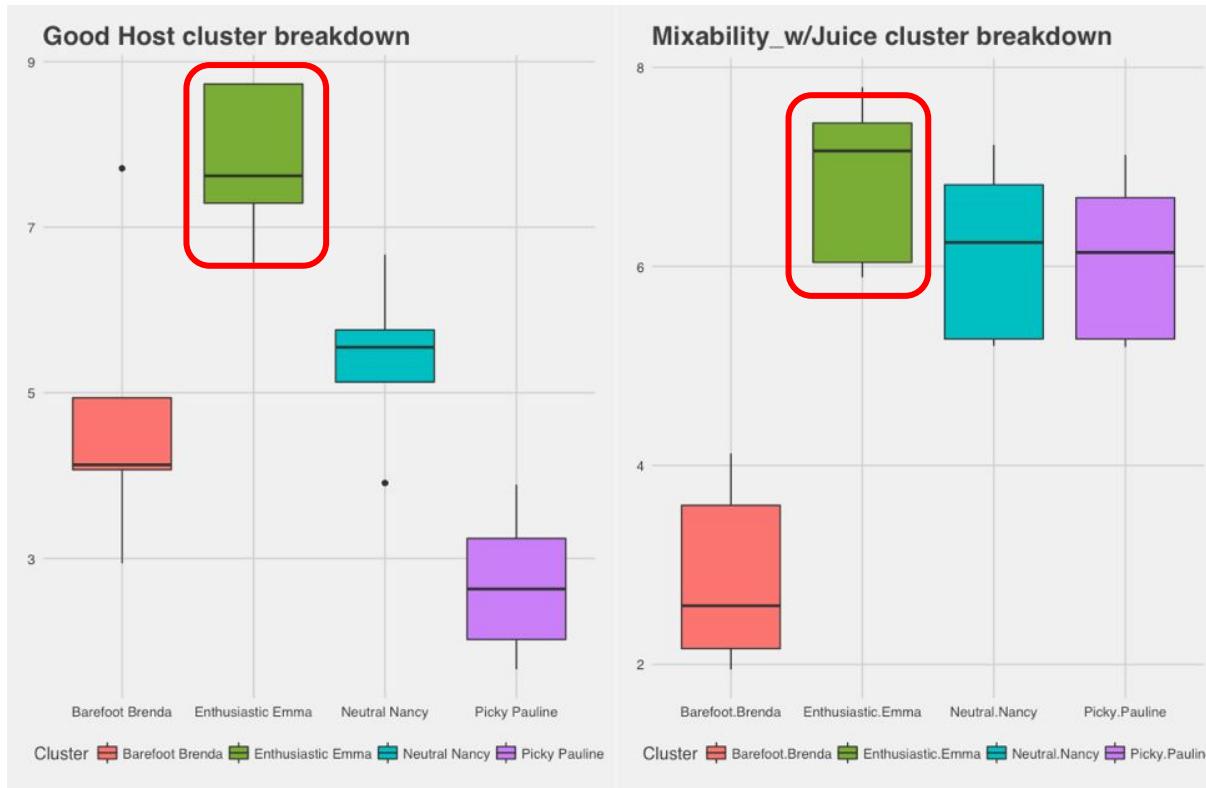
Enthusiastic Emma is the youngest of the group. At 41 years old, she has a lower income than the rest and is more likely to be single. Emma is enthusiastic about a variety of wine cocktail brands and is an active promoter of wines she likes.



Neutral Nancy

Neutral Nancy is a married, 47-year-old. She enjoys Gallo brands but is not overly enthusiastic about any brand one in particular. Nancy values education and probably spends more time reading books than recommending wines to friends.

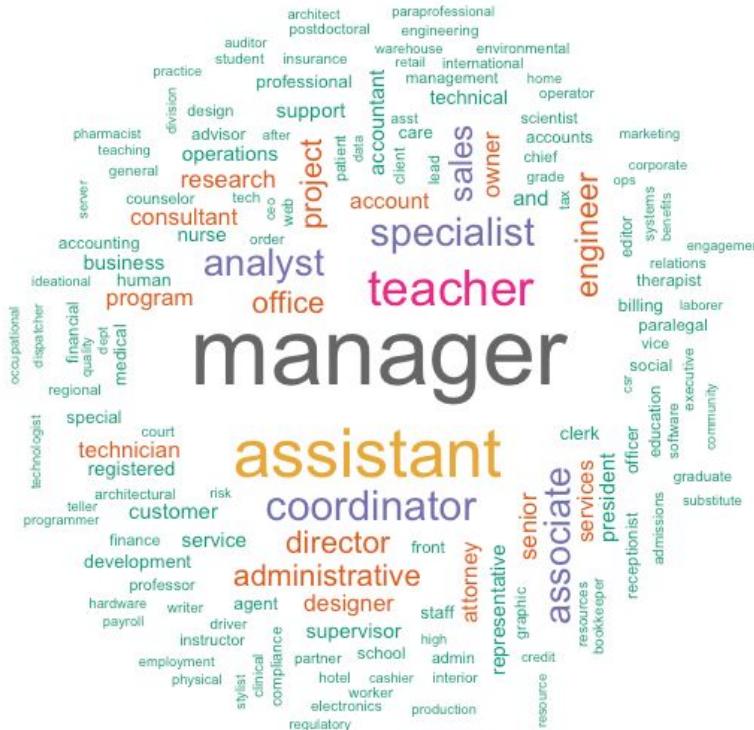
Enthusiastic Emma's tend to rate brands more favorably than other clusters



What does Enthusiastic Emma look like?

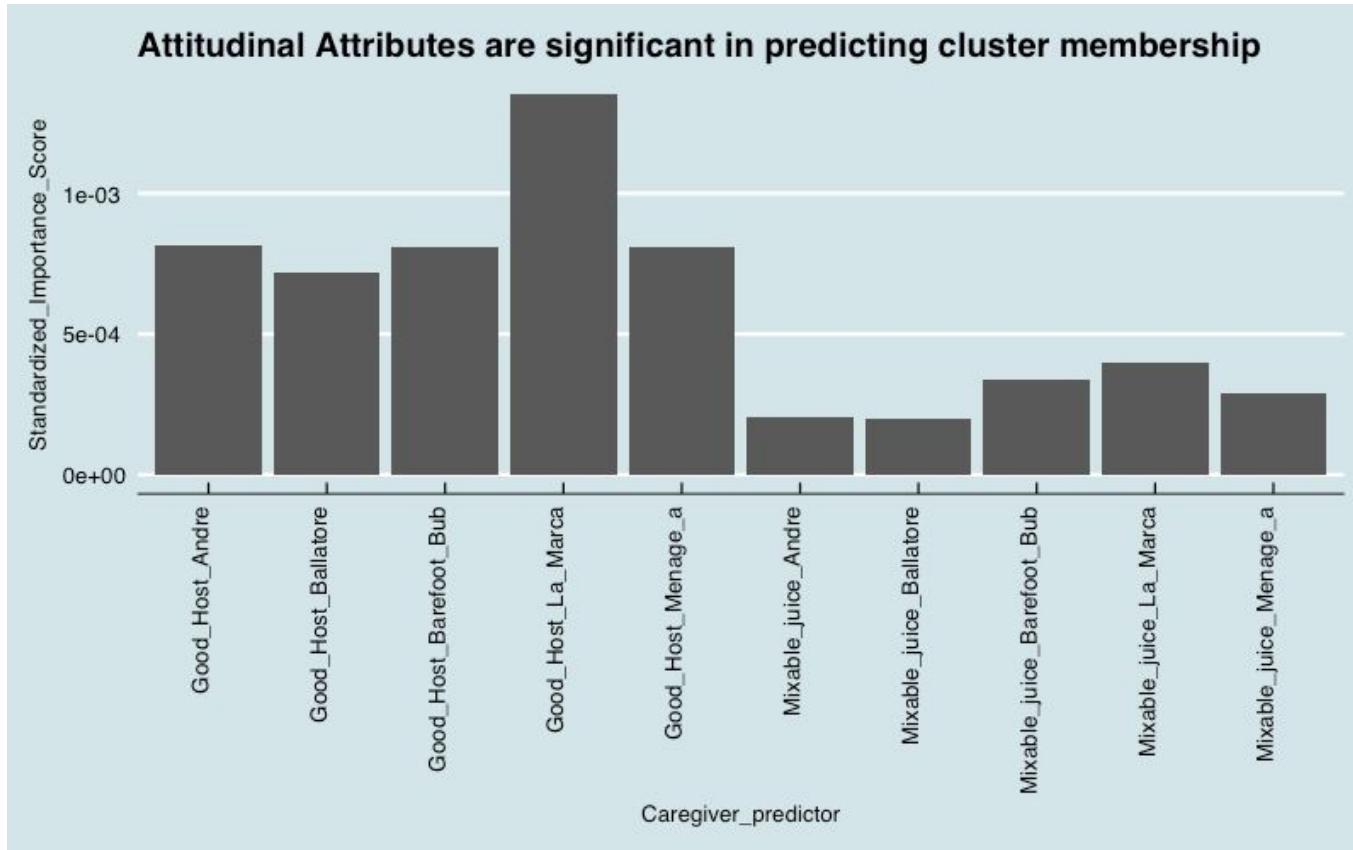


Popular Industries



Popular Jobs

What drives Enthusiastic Emma?





Recommendations

3

Key brand recommendations for the Ice Horse brand



Lifestyle Branding



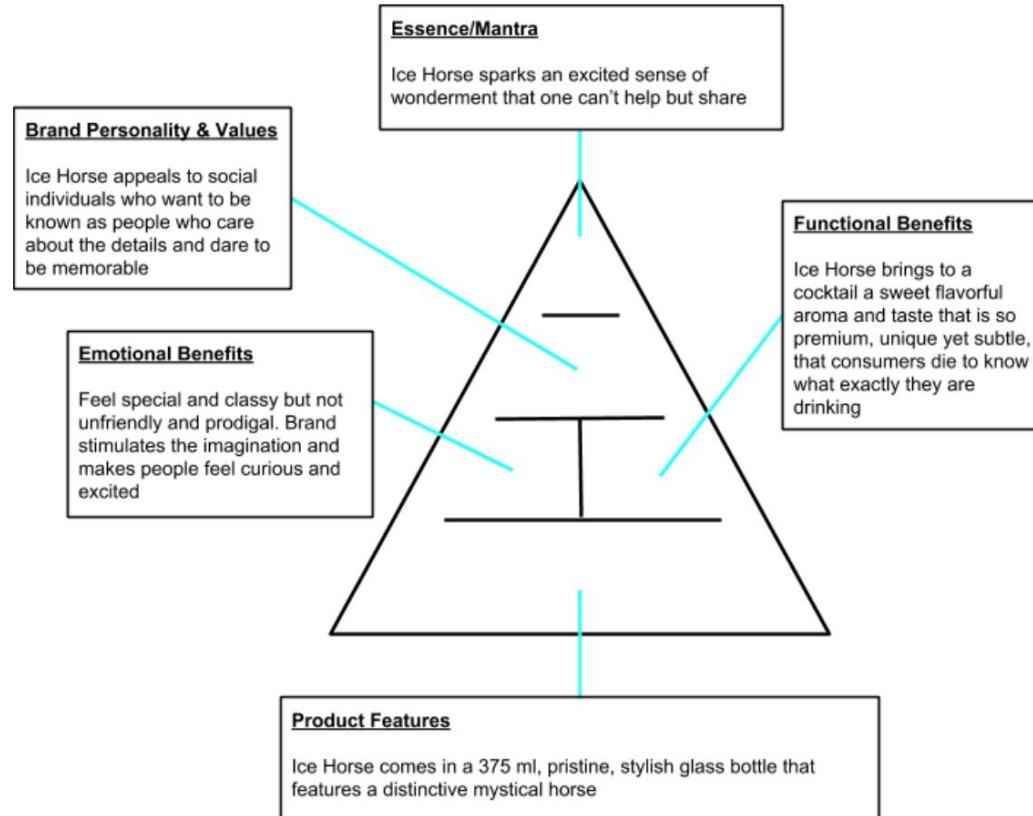
Virality



Occasion-based

Recommendations drive brand equity for Gallo

Brown-Forman Brand Equity Model shows how Ice Horse will appeal to social individuals who value details, uniqueness, and shareability



Recommendation: Use strong imagery on website to brand Ice Horse as a lifestyle



Occasion-based



Lifestyle
Branding



Recommendation: Use strong imagery on website to brand Ice Horse as a lifestyle



Occasion-based



Lifestyle
Branding



Recommendation: Utilize Influencer Marketing to brand Ice Horse as a lifestyle and mimic rosé's virality

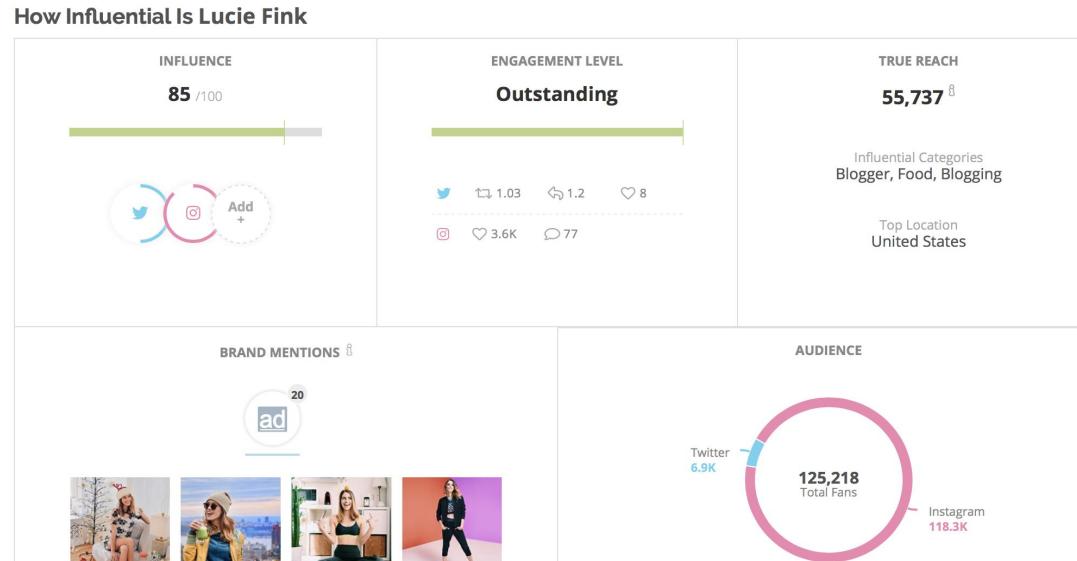


Lifestyle
Branding



Virality

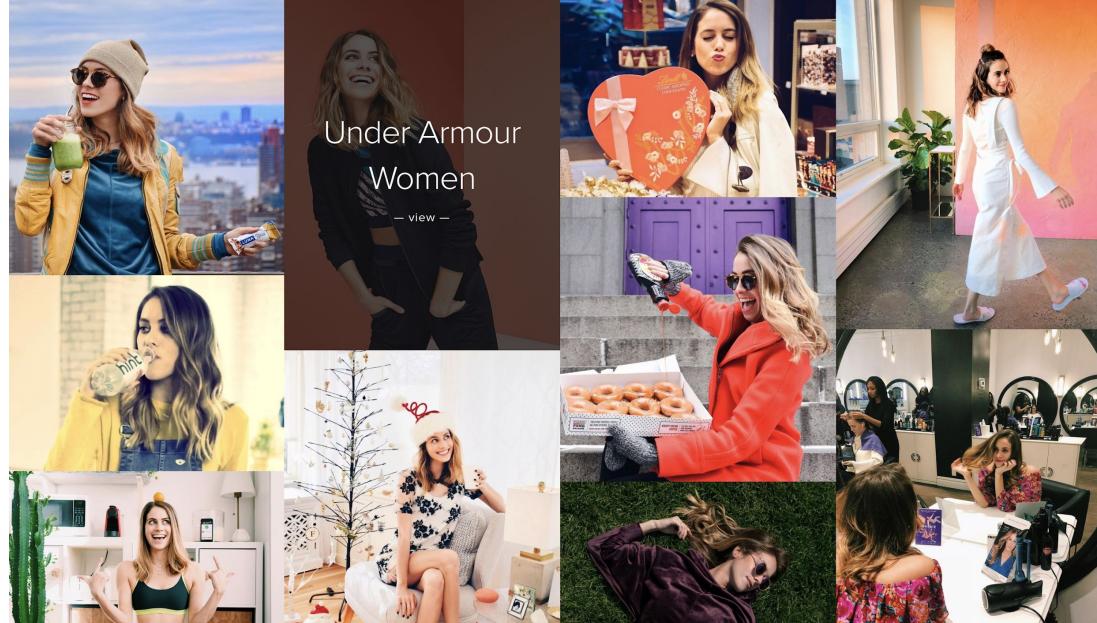
The screenshot shows the influencer profile for Lucie Fink. At the top, there is a photo of her, her name "Lucie Fink", a Twitter icon, and a location indicator "New York". Below that is a bio: "Video producer, lifestyle host, stop motion artist. #TryLivingwithLucie - @refinery29". A blue diamond-shaped badge on the right says "85". Below the bio is a button labeled "Add to Campaign". At the bottom of the profile are tabs for "Overview" (which is selected), "Content", "Demographics", and "Network". On the far right, there are icons for settings, download, and update, followed by the text "Update (4w)".



Recommendation: Utilize Influencer Marketing to brand Ice Horse as a lifestyle and mimic rosé's virality



Lifestyle
Branding



Virality

■ Recommendation: Use AR to develop cutting edge storytelling at specific occasions



Virality



Occasion-based



Recommendation: Use sample ice wine cocktail recipes to target occasion-based branding

At a bar

Connoisseur Cocktail:

1 oz. Ice Horse

1/2 oz. Dry Vermouth

1 lemon sliced for garnish



1. In a cocktail shaker filled with ice, add Ice Horse and vermouth.
2. Shake sharply and strain into a cocktail glass.
3. Garnish with a lemon twist or a sage leaf.



Occasion-based

At a picnic

Ice Wine Slushies:

8 to 10 ice cubes

6 oz (200ml) Ice Horse

1 cluster of grapes



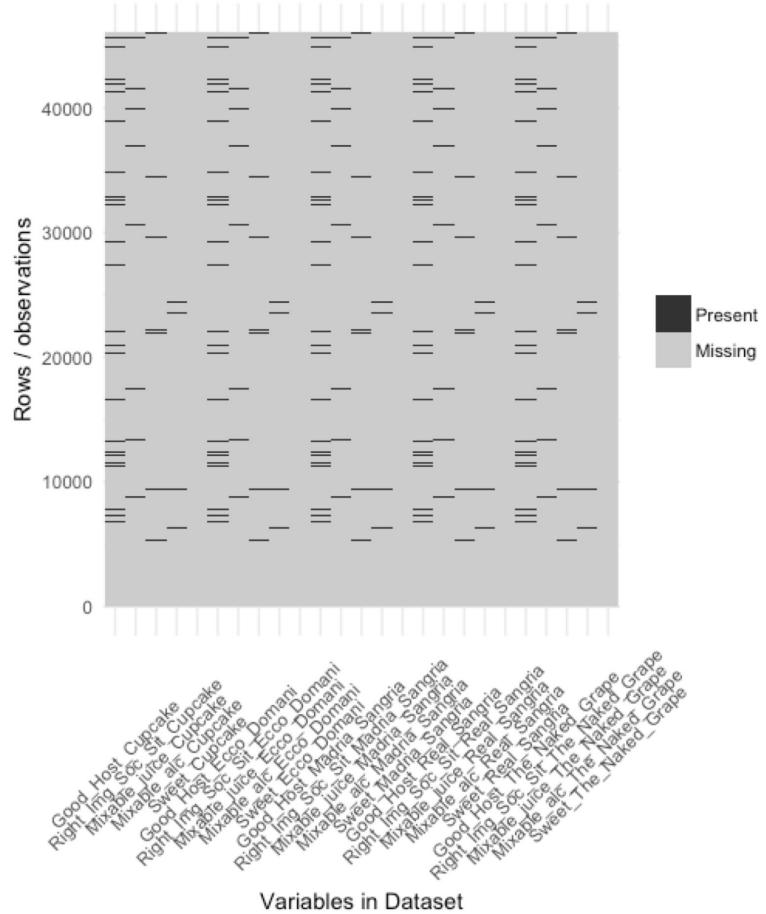
1. Pour COLD ice wine over several ice cubes and mix in a blender.
2. Add more ice cubes to taste and serve the Ice Wine Slushie in a martini glass.
3. Garnish with frozen grapes.

Limitations



4

Limitation #1: Data Quality



Implications of poor data quality:

1

Limited Scope of Analysis



2

Expensive organizational cost



Solution: Gallo should redesign the survey to increase data quality

Unimportant Semantic Differential Variables	
Adventurous	Safe
Traditional	Modern
Feminine	Masculine
Edgy	Calm
Approachable	Distant
Reliable	Inconsistent
Simple	Complicated
Special	Ordinary
Serious	Silly
Delicate	Strong
Youthful	Mature

Solution: Gallo should redesign the survey to increase data quality

Important Semantic Differential variables, ordered by importance	
Intriguing	Unstimulating
Attractive	Unappealing
Special	Ordinary
Unimaginative	Creative
Successful	Unsuccessful
Unique	Common
Confident	Uncertain
Authentic	Fake
Sophisticated	Casual
Fun	Boring
Trendy	Unpopular
Extravagant	Modest

Limitation #2: Implementation Logistics



\$52.99 from Woods Wholesale Wine

2013 Pillitteri Estates Winery Vidal
Icewine Reserve, Niagara-on ...



\$84.99 from 3 stores

Inniskillin Cabernet Franc Icewine,
Niagara Estate (Vintage Varies ...)



\$71.79 from tannico.com

Vidal Icewine 2015



\$39.99 from Marketview Liquor

Casa Larga Vidal Blanc Ice Wine

375ml

Limitation #2: Implementation Logistics



375ml

\$13.99 from Marketview Liquor

Merritt Winery Bella Ice Wine

★★★★★ (1)



\$12.98 from Wine Library

Tomasello Vidal Blanc Ice Wine 2015 |
Wine Library

Solution: Gallo must focus on quality of ice wine product first, then quantity

“ Whenever an American business wants to produce a product, we always worry about them producing this large volume of product, [so] they're able to produce it at a lower price. ”

-2018 Craig Youdale, Niagara College's Dean of the Canadian Food and Wine Institute, quote on US entering ice wine market despite Canada's dominance



Next Steps

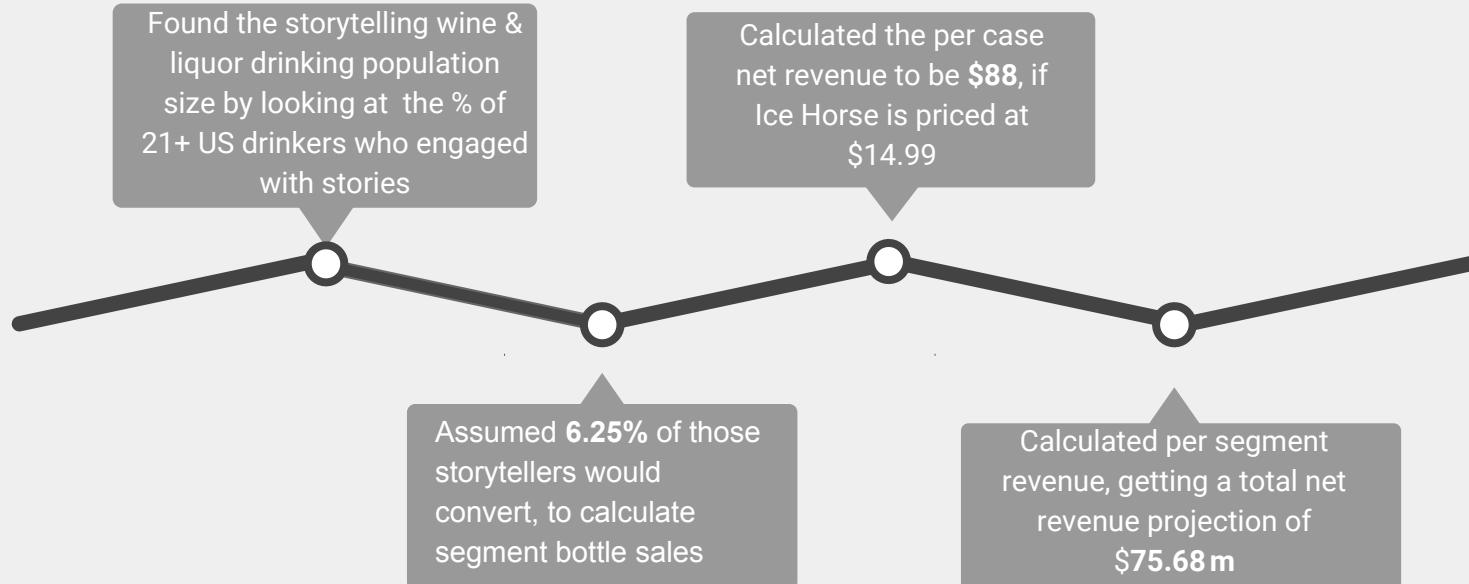


5

Ice Horse can earn **\$62M-\$89M** in year 5 net revenues

Our model projects a **\$75.68M** net revenue for Gallo.

How did we get this number?



Next steps will help Gallo drive net benefits within 5 years

Immediate

Short-term

Long-term

1

Simplify and reorganize survey to improve data quality

Roll out Ice Horse to Caregivers and casual-socials

2

3 Look into further brand opportunities utilizing a popularized ice wine. We recommend further analyzing consumer perceptions of the product, especially after Ice Horse has been launched.

Questions



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Appendix: Audience Breakdown of port/sherry drinkers shows great potential for ice wine in West and South

Census Region			
Region US: New England	268	4.8	
Region US: Mid Atlantic	701	12.5	
Region US: South Atlantic	1,111	19.9	
Region US: East North Central	850	15.2	
Region US: East South Central	322	5.8	
Region US: West North Central	331	5.9	
Region US: West South Central	677	12.1	
Region US: Mountain	436	7.8	
Region US: Pacific	891	15.9	

Appendix: Audience Breakdown of vermouth drinkers also shows great potential for ice wine in West and South

Census Region			
Region US: New England	163	6.8	 
Region US: Mid Atlantic	309	12.9	 
Region US: South Atlantic	437	18.2	 
Region US: East North Central	326	13.6	 
Region US: East South Central	108	4.5	 
Region US: West North Central	142	5.9	 
Region US: West South Central	258	10.8	 
Region US: Mountain	221	9.2	 
Region US: Pacific	428	17.9	 

Appendix: sensitivity analysis on liquor/wine markets

		AVG % of liquor market in year 5									
Market Share		0.0650%	0.0651%	0.0652%	0.0653%	0.0654%	0.0655%	0.0656%	0.0657%	0.0658%	0.0659%
AVG % of wine market in year 5	0.064%	58.6	58.6	58.7	58.7	58.8	58.8	58.9	58.9	59.0	59.0
	0.065%	59.0	59.1	59.1	59.2	59.2	59.2	59.3	59.3	59.4	59.4
	0.066%	59.4	59.5	59.5	59.6	59.6	59.7	59.7	59.8	59.8	59.9
	0.067%	59.9	59.9	60.0	60.0	60.0	60.1	60.1	60.2	60.2	60.3
	0.068%	60.3	60.3	60.4	60.4	60.5	60.5	60.6	60.6	60.7	60.7
	0.069%	60.7	60.8	60.8	60.8	60.9	60.9	61.0	61.0	61.1	61.1
	0.070%	61.1	61.2	61.2	61.3	61.3	61.4	61.4	61.5	61.5	61.6
	0.071%	61.6	61.6	61.6	61.7	61.7	61.8	61.8	61.9	61.9	62.0
	0.072%	62.0	62.0	62.1	62.1	62.2	62.2	62.3	62.3	62.4	62.4
	0.073%	62.4	62.4	62.5	62.5	62.6	62.6	62.7	62.7	62.8	62.8

Appendix: Calculating per case revenue

1. Retail Price/Bottle \$14.99
2. Bottles/Case x 12
3. Retail Price/Case \$180
4. Retailer Markup - \$54 (30% of Retail Price)
5. **Net List \$126** Retailer pays distributor
6. Distributor Markup - \$25 (20% of Net List)
7. **Net Landed \$101** Cost to the distributor
8. State Tax 6.64 (as a percentage ~ 6.66%, source: slide 16 of McIntire Brand Charter)
9. Freight 1.55 (assumed to be a fixed cost per case)
10. **Net FOB \$92.81** Distributor pays Gallo
11. Federal Taxes - 4.81(as a percentage ~ 5.22%, source: slide 16 of McIntire Brand Charter)
12. **Gallo Net Revenue/Case \$88**

Appendix: Monte Carlo analysis for projections

Expected case Calculations for wine drinkers:

80 M wine drinkers * 80% of people engage with authentic storytelling brands = 64 M people

64 M people * 25% of leads convert = 16 M people

25% * 16 M = 4 M people

4 M * 2 bottles each = 8 M bottles

8 M bottles / 12 bottles in a case = 670,000 cases, revenue = 58.96M

Expected Case Calculations for liquor drinkers:

45.5 M liquor drinkers * 80% of people engage w/authentic storytelling brands = 36.45 M people

36.45 M people * 25% of leads convert = 9.1 M people

25% * 9.1 M people = 2.28 M customers

1.82 M customers * 1 bottle each = 2.28 M bottles

2.28 M bottles / 12 bottles in a case = 190,000 cases, revenue = 16.72M

Bear case Calculations for wine drinkers:

80 M wine drinkers * 80% of people engage with authentic storytelling brands = 64 M people

64 M people * 20% of leads convert = 12.8 M people

20% * 12.8 M = 2.56 M people

2.56 M * 2 bottles each = 5.12 M bottles

5.12 M bottles / 12 bottles in a case = 425k cases, revenue = 37.4M revenue

Appendix: Monte Carlo analysis for projections cont

Bear Case : Calculations for liquor drinkers:

45.5M liquor drinkers * 80% of people engage w/authentic storytelling brands = 36.45 M people

36.45M people * 20% of leads convert = 7.29 M people

20% * 9.1 M people = 1.458 M customers

1.458M customers * 1 bottle each = 1.458 M bottles

1.458M bottles / 12 bottles in a case = 190,000 cases, revenue = **10.692M**

Bull Case : Calculations for liquor drinkers:

45.5 M liquor drinkers * 80% of people engage w/authentic storytelling brands = 36.45 M people

36.45 M people * 30% of leads convert = 10.935 M people

30% * 10.935 M people = 3.2805 M customers

3.2805 M customers * 1 bottle each = 3.2805 M bottles

3.2805 M bottles / 12 bottles in a case = 190,000 cases, revenue = **24.057M**

Bull Case : Calculations for wine drinkers:

80 M wine drinkers * 80% of people engage with authentic storytelling brands = 64 M people

64 M people * 30% of leads convert = 19.2 M people

30% * 19.2 M = 5.76 M people

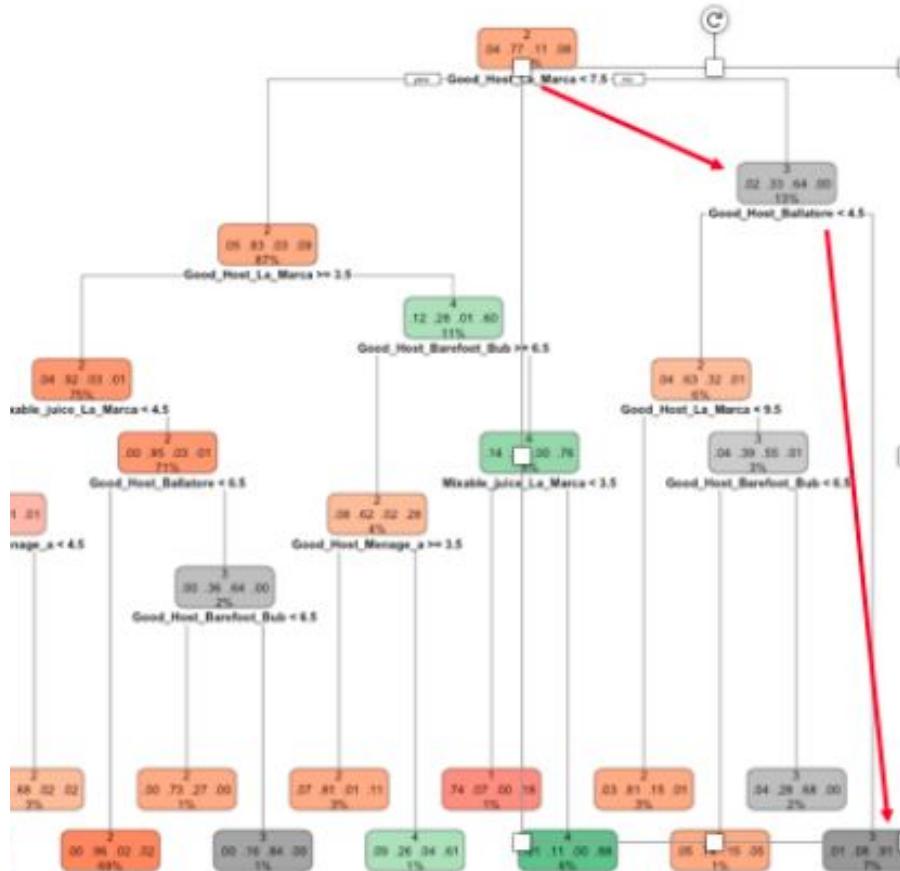
5.76 M * 2 bottles each = 11.52 M bottles

11.52 M bottles / 12 bottles in a case = 960k cases, revenue = **84.48M**

Appendix: Features used in Clustering/Random Forest Modelling

1. Makes me feel like a good host - shared experience
2. Helps me project the right image in a social situation - premium experience
3. Good mixed with other beverages, juices - customizability
4. Good mixed with other alcohol beverages - customizability
5. Sweet Tasting
6. Demographics (Age, HH Size, Income, State, Job Industry, Job Title)
7. Brand analyzed: Andre, Ballatore, Barefoot Bubbly, La Marca & Ménage à Trois

Appendix: Random Forest Model used in predicting Cluster Membership



Appendix: Sample UserTest Questions

Tasks

1. Please watch the video in the next task to learn about the ice wine making process.
2. Launch URL: <https://www.youtube.com/watch?v=gdvZs8myWHI>
You have been taken to: <https://www.youtube.com/watch?v=gdvZs8myWHI>. When you see the page, move on to the next step.
3. Iced (notice the d) wine is similar to ice wine, however it has a less strict making process. Iced wine does not require that the grapes be frozen on the vine, meaning regular grapes in warmer climates can be frozen and then processed into a wine, resulting in a product that tastes similar.
4. After learning about ice and iced wines, what are your general impressions of them? [Written Response]
5. Would you substitute a glass of wine for a glass of iced wine? [5-point Rating Scale: Not at all likely to Very likely]
6. On a scale of 1-5, with one being not at all important, and 5 being very important, how much does the difference in wine making process matter to you? Note iced wines are typically ten dollars cheaper. [5-point Rating Scale: Not at all important to Very Important]
7. The next task will direct you to a video of an ice wine cocktail, that is a cocktail based with ice wine.
8. Launch URL: <https://www.youtube.com/watch?v=wwSdcHKADso>
You have been taken to: <https://www.youtube.com/watch?v=wwSdcHKADso>. When you see the page, move on to the next step.
9. The next task will direct you to a video of a wine cocktail.
10. Launch URL: <https://www.youtube.com/watch?v=iDdCehMIRwg>
You have been taken to: <https://www.youtube.com/watch?v=iDdCehMIRwg>. When you see the page, move on to the next step.
11. Would you be more inclined to substitute iced wine for wine in a wine cocktail, such as sangria, if you didn't need to add any extra sugar in the cocktail. [5-point Rating Scale: Not at all likely to Very likely]
12. On a scale of 1-5, how much does the amount of preparation impact your likelihood of making wine cocktails. [5-point Rating Scale: Not at all to Heavily impacts my decision]

Appendix: Best practices with serving ice wine

Stemware: Although traditionally served in smaller glasses, icewine benefits from a regular white wine glass, which showcases all of its wonderful aromas.

Temperature: 10 to 12°C. Don't overchill; put it in the fridge only an hour or two before serving.

Shelf Life: Because the sugar content is high, icewine will last for three to five days after opening if stored in the refrigerator.

Best enjoyed: On its own after a meal. Alternatively serve with a dessert that is a bit lighter and less sweet, or with something savoury and full-flavoured for balance.



Appendix: Digital Analytics with ComScore Cont.



Port/sherry drinkers are:

- **Wealthy**- 54.8% make \$75,000+ and 38.2% make \$100,000+
- **Supportive of domestic business**- 42.1% find it important to buy American products
- **Recommenders**- 51.4% frequently advise others about food and beverages and 32.8% frequently advise others about restaurants and bars
- **Loyal**- 58.7% agree that when they find a brand they like, they stick to it



Vermouth drinkers are:

- **Wealthy**: mean income of \$99,379 and a median income of \$87,500
- **Mature & Established**: average age of drinkers is 40 years old
- **Also drink liquor and other cocktails**: 99% have drank Scotch Whiskey in the last month and 58% have drank Bourbon in the last month
- Increase in customer willingness to create these cocktails at home

Appendix: comScore details



- Instagrammability of ice wine, similar to rosé, will play an important role, particularly in the beginning stages of launching brand
- Both male and female rosé drinkers age 21-49 making \$75,000+ displayed promising caregiver characteristics, with women displaying more
 - **Hosting/social events:**
 - Entertaining at home was men's top leisure activity at 35.5% and women's third highest leisure activity at 49.6%
 - 42.1% of women and 19.8% of men attended a picnic/bbq in past 6 months
 - **Movie preferences:** Family was female's most popular viewed genre at 25.4%

