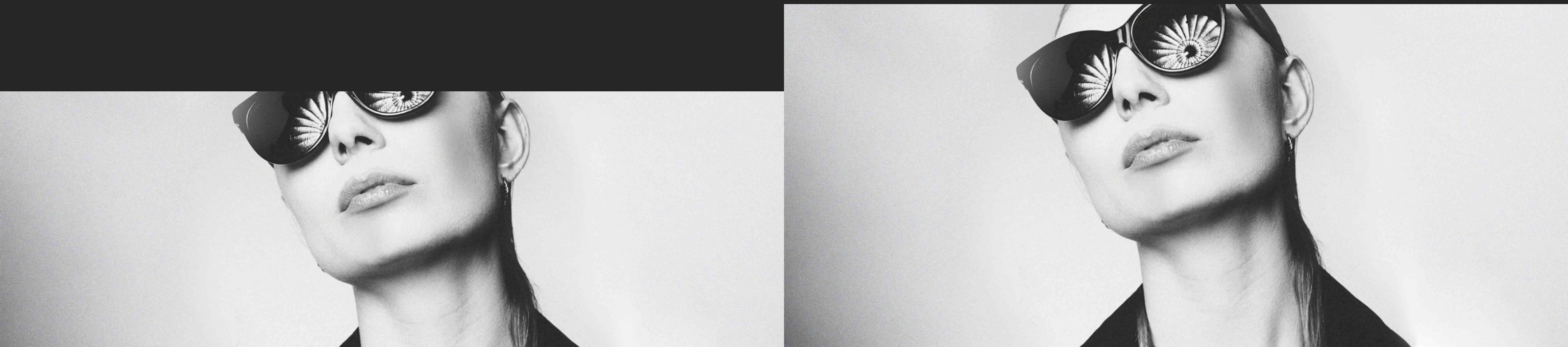


Zeitgeist Research

Wine AAU

Case Study

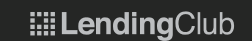
ZEIT GEIST
R E S E A R C H



B2C and B2B

We don't like to brag... but you should know that the **most trusted brands** in the industry have chosen us.

About 60% of our business is B2C and 40% B2B.



01

THE PROJECT

Objectives + Impact

Objectives of a CPG Brand

A national wine manufacturer wanted to update their wine consuming personas and understand the [changes to the category](#) from a previous attitude & usage study so that they could better partner with their retailers.

The goal was to outline the shifts in consumer demographics as a new generation turned 21 and be able to resonate with that new consumer base without alienating the core users who have been loyal consumers.

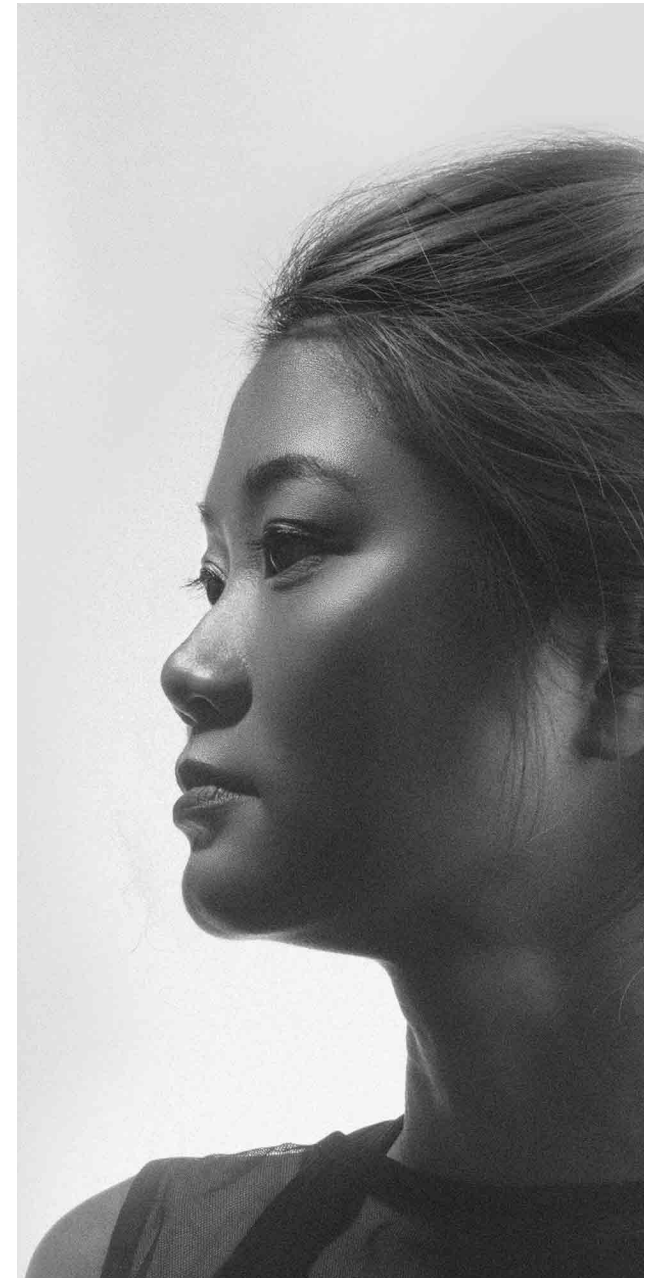
The company believed that there might be an opportunity to expand into new varietals, new packaging and new cross promotions to become a better partner with retailers.

In addition, a core understanding of who the new consumers were and what changes, if any, the core of consumers age 35+ had made in their shopping and consumption habits would be crucial to developing their new [marketing strategy](#).

Impact

Understanding how consumers think about the category and their most common usage occasions guided the creation of a new marketing campaign and in-store presence to attract the core wine consumer to the shelf and increase purchase.

By listening to wine category consumers, the store and its wine manufacturer partnered together to create the best in store solution and cross-category promotions to increase basket ring with their core consumer targets.



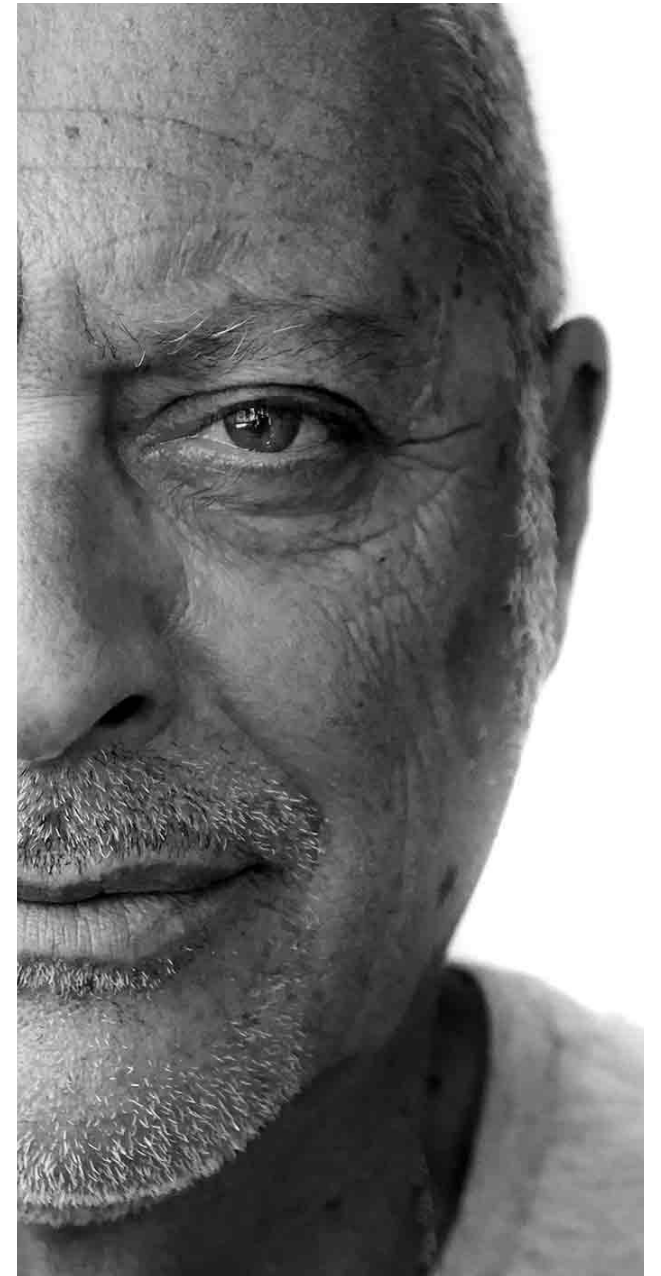
Approach

In-Depth Interviews and Custom Survey with Advanced Analytics

Because our client was new to the wine category, we conducted a series of In-Depth Interviews (IDIs) to better understand consumers' perceptions of the category and inform the quantitative phase that would follow.

Using the insights from the qualitative IDIs, we developed a custom survey to identify who our brand's most likely purchasers are, what factors are most likely to influence their purchase decision and what their perceptions and attitudes are when purchasing a wine across multiple channel options. We also surveyed respondents for their media habits and perceptions on local vs internationally based wine companies. We then leveraged our advanced analytics capabilities to uncover deeper insights about category consumers from the quantitative data.

We then implemented a Decision Tree Regression Analysis to understand and define the hierarchy of decisions that lead to the purchase. In other words, which factors are most important to the consumer as they shop for wine?



Our Findings



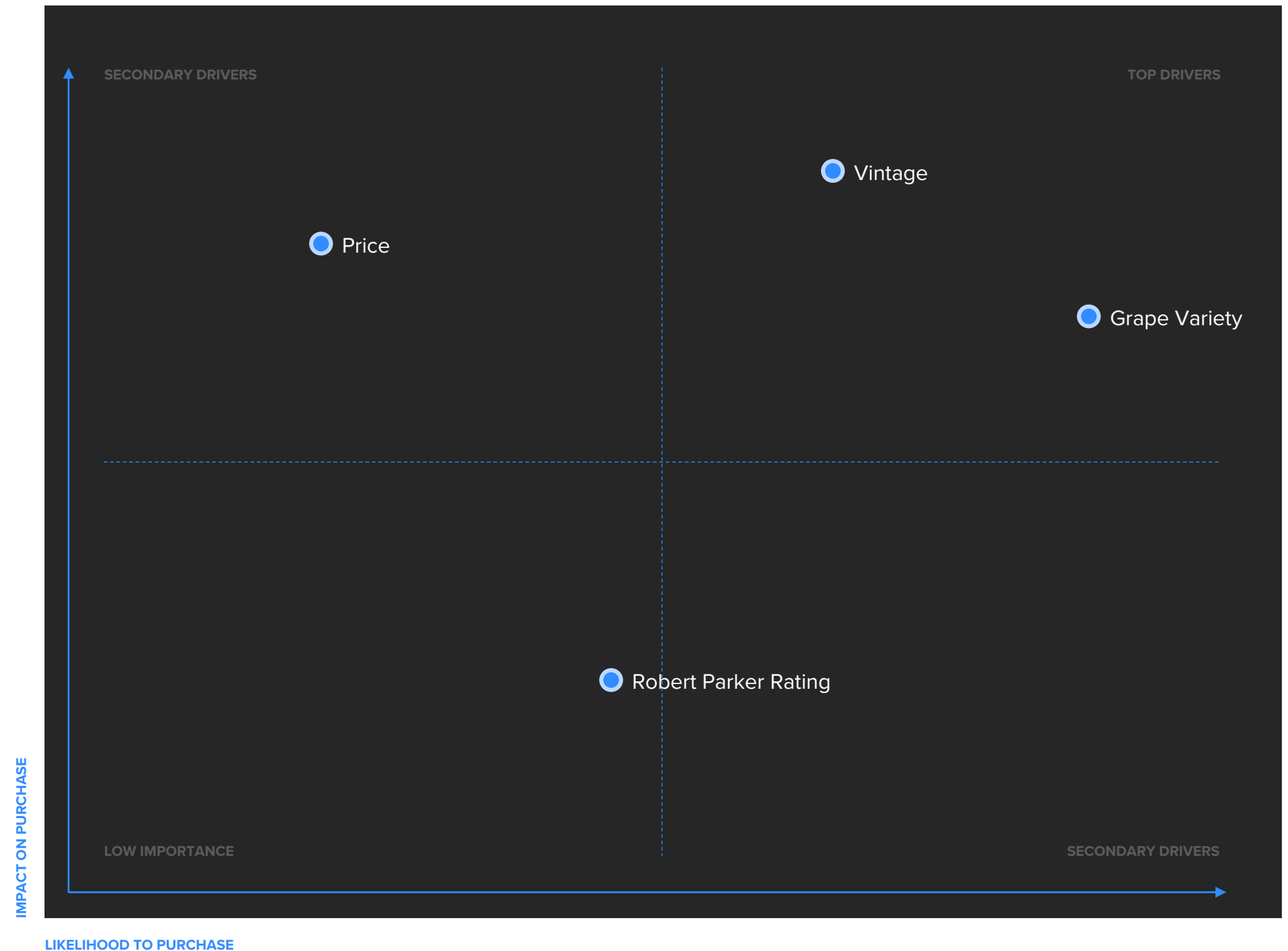
Key Purchase Drivers: Quadrant Analysis

Grape Variety is by far the biggest driver of purchase and any messaging strategy should focus on Washington's primary grape varieties such as Merlot, Cabernet Sauvignon, Syrah and Riesling.

Vintage is also a key driver due to quality and taste variations from one year to the next.

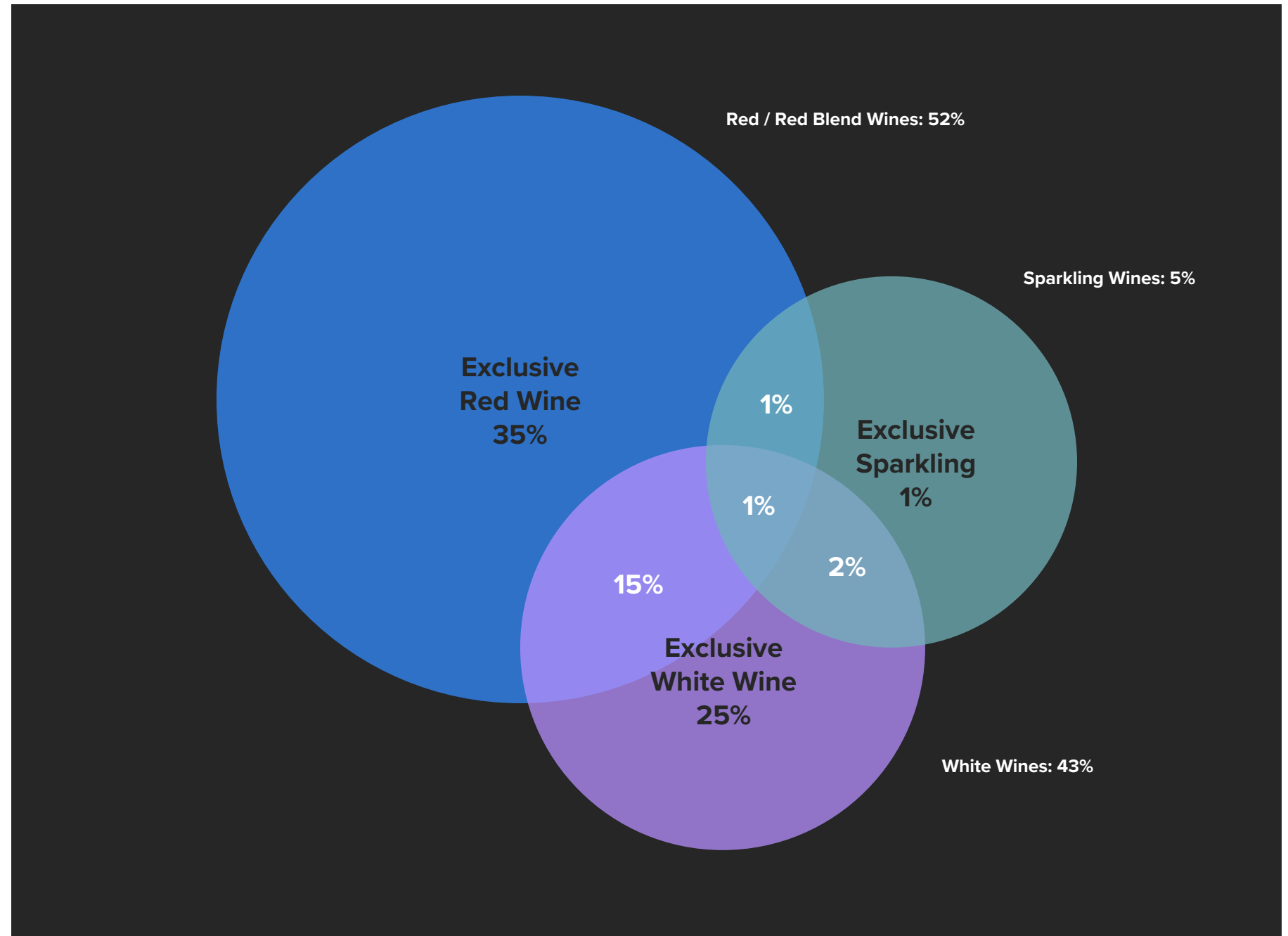
Price is a strong consideration factor for impact on purchase, but not always a top consideration in the beginning of the purchase cycle.

Our speculation is that price sensitive consumers are drawn to low priced California and Imported wines.



Category Usage: Exclusivity & Overlap

Red Wined drinkers make up over half of the category share, with 35% being exclusive red wine drinkers.



Other = 5%
Note: Venn diagram not drawn to scale

Consumers have clear preferences for what they consider a suitable alternative to the wine they originally wanted to buy.

Most prefer to stay within their Red or White options, switching only to a Rose or Dessert Wine if necessary

Category Preference: Substitutability

If my Cabernet was not available, I would choose:

Pinot Noir: 39%

Merlot: 36%

Syrah: 29%

Red Blend: 15%

Rose / Dry White: 5%

Nothing: 10%

If my Chardonnay was not available, I would choose:

Sauvignon Blanc: 42%

Pinot Gris: 36%

Pinot Blanc: 27%

Dry Riesling: 12%

Rose: 10%

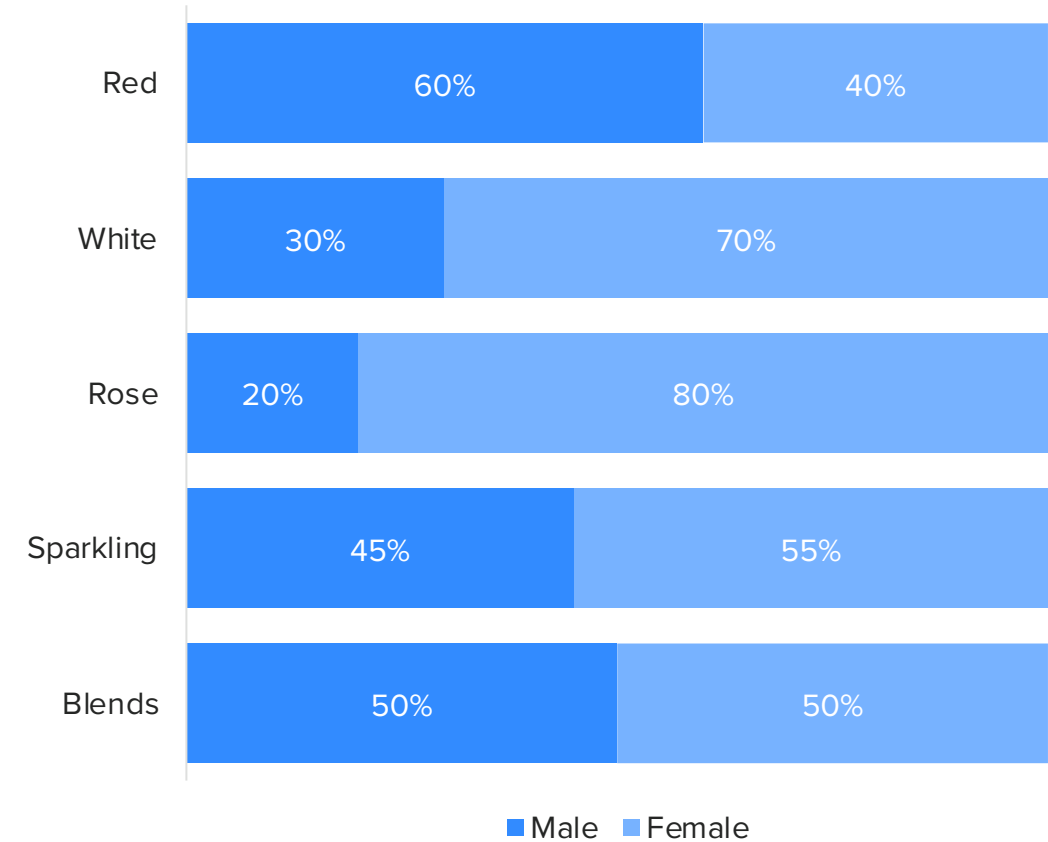
Dessert White: 5%

Nothing: 8%

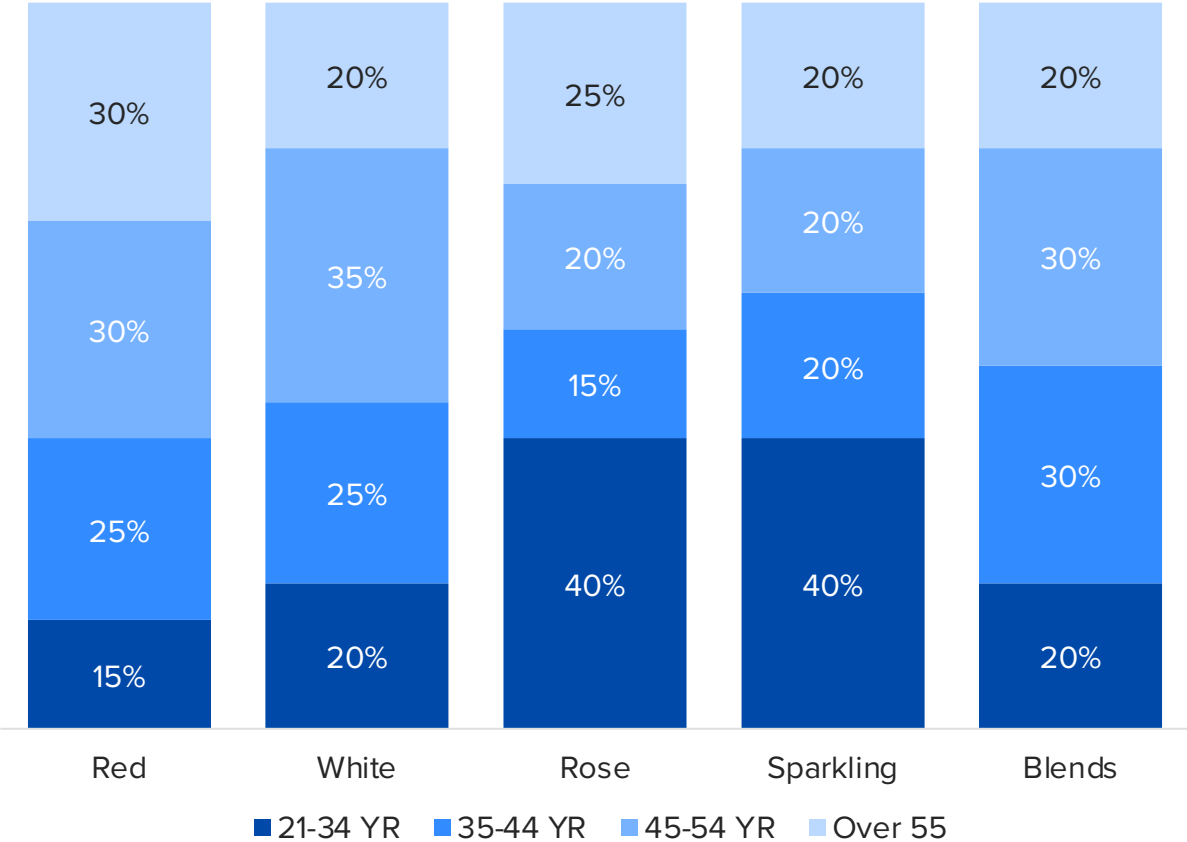
Females overwhelmingly prefer a White Wine to their Male Counterparts but Sparkling and Blends are equally well liked.

We see that the Millennial and GenX groups prefer Red and Blends more than the younger age groups who prefer a Rose or Sparkling Wine option.

Wine Type Preferences by Gender



Wine Type Preferences by Age



In-Depth Interviews

Not surprising, price and brand name both influence the decision of which wine to buy. Many consumers know if they want a red or white, but the varietal and brand name are intermingled with the price range in the decision factor.

Consumers have little brand loyalty, instead buying the wine that looks good to them at the time.

“

I like to buy wine for my book club and parties. I usually know that I want one red and one white wine. The brand name isn't as important as the price – it's fun to try new brands that are on sale.

—April, Female, 42

“

You know how it is, you're standing there looking at all these drinks and you're thinking, what looks good to me now. I don't care about the brand, I'm looking to get a good price on a nice tasting wine.

—Mike, 29

“

It really depends on what I want in that moment. If something catches my eye and has a nice label, and the price is good, then I might try it even if I also buy the brand I came in to get in the first place. I can be impulsive.

—Monique, 37

Oenophile

“The first duty of a wine is to be red...”

Demographics	Performs these activities on a regular basis
Skew slightly Male (60%)	Dine out a few times a month (74%)
48% Caucasian	Cook a meal at home (80%) few times a week.
62% Married	Watch Sports (70%)
1 Child in HH (53%)	ShopOnline (73%)
Advanced Degree (53%)	Travels Internationally Yearly (20%)
55% Aged 35-54 years old	Manage Personal Finances (65%) – budget /invest
Mixture of Millennial & GenX	Social Media (63%)
Average Income \$87k	Paid Streaming Video (63%)
	Workout / Exercise 2-3 Times per week (68%)
	Shop in person (39%)
	Participate in a Hobby (73%)
	Eat Healthy (52%)
	Plays Video Games (62%) several times a month
	Outdoor Recreation / Visits Parks (50%)

Our Recommendation

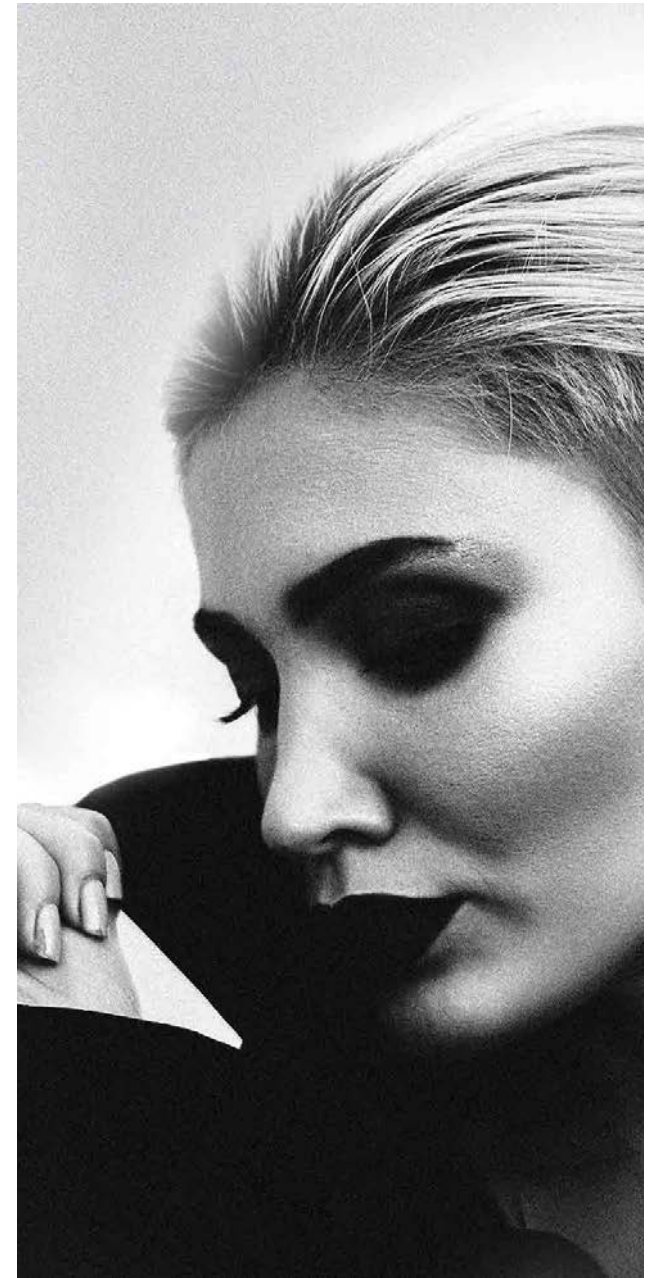


Our Recommendation

Focus on Marketing at the Shelf

Based on our research, we recommended our client focus the development of the new line to appeal to the key segment Millennials within a specific income range.

Knowing that consumers are purchasing wine brands on impulse and making their decision at the Point of Sale, we recommended to our client that they spend their limited marketing budget on packaging and POS assets that stand out and communicate the organic ingredients and local sourcing that the targeted customer base was seeking.



02

ZEITGEIST RESEARCH

WHO WE ARE.

The Company

Zeitgeist Research is a virtual, boutique, full-service research company working with Fortune 500 companies, ad agencies, and start ups.

Zeitgeist Research works with clients from a wide range of backgrounds, about half of all projects are B2B and half are B2C.

The Founder

The company was founded in 2012 by Dr. Manfred Bluemel, Ph.D., who was head of consumer insights at [Amazon](#) for eight years where He was inspired by Jeff Bezos' philosophy of customer obsession. And it shows: Zeitgeist's current NPS is 92!

The Z-Team

Other Z-Leaders are Dr. Bill Sallas, Ph.D., our behavioral psychologist leading the qualitative team and Kelley Raleigh, former Director of Insights at Samsung, Dannon, and PepsiCo and head of the quantitative research team at Zeitgeist.

WHY WORK WITH US?

Experience

All your research projects are managed by senior research professionals who each have **10+ years** of experience.

As a result, our reports are strategic and tell a story.

Quality

Our customer obsession and relentless feedback loop as well as our strategic reports have earned us an **NPS of 92**, reflecting the quality and service level we deliver.

Fast

If you need results in days, not weeks, our Basic or Accelerated research solutions are your answer.

Fully customizable Bespoke projects can be turned around in three weeks.

Innovative

We provide several advanced methodologies, from advanced analytics to neuro-science, for you to choose from that fit your budget.

Variety of Research Solutions

Our full-service Research Solutions offer products and approaches at every price level and sophistication.

Affordable

We deliver high-quality research at a fraction of the price with full cost transparency.

There are no games at Zeitgeist Research. Our detailed line-by-line item pricing, allows you to scale the project up or down to fit your budget.

TYPE OF RE- SEARCH

Advertising

- Ad Concept Testing
- Ad Creative/Copy Testing
- Ad Effectiveness
- Message Testing

Brand

- Awareness, Attitudes, and Usage (AA&U)
- Brand Tracking
- Positioning
- Personas
- Segmentation
- Value Proposition

Acquisition and Retention

- Customer Satisfaction
- Decision Journey/Path-to-Purchase
- Logo Testing
- Name Testing
- Packaging
- Product Concept
- Target Market Sizing and Definition
- Win/Loss Analysis

Employee Surveys

- Employee Satisfaction
- Discrimination Assessment

METHO- DOLOGY

Qualitative

- Focus Groups
- In-Depth Interviews (IDIs)
- Online Bulletin Boards
- Shop-Alongs
- Intercepts
- Ethnography
- Eye Tracking

Qual. Neuro-response

- Facial Coding

Quantitative

- Online Surveys
- Phone Surveys

Advanced Analytics

- NLP Sentiment Analysis
- Key Driver Analysis/Regressions
- MaxDiff
- TURF
- Conjoint, etc.

Quant. Neuro-response

- Intuitive Associations



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Thanks for taking the time to learn more about Zeitgeist Research.

Stop Guessing. Contact Us.

info@zeitgeistresearch.com