



THE QUIRK'S EVENT

Why did she buy that Chardonnay?

How need-states inform the omni-channel path to purchase

prodege

VISTA
GRANDE

TREASURY
WINE ESTATES

About Prodege

2005
prodege
Established

120M+
Global
Respondents

450+
Employees
Globally

2020
50M+
Annual Survey
Completes

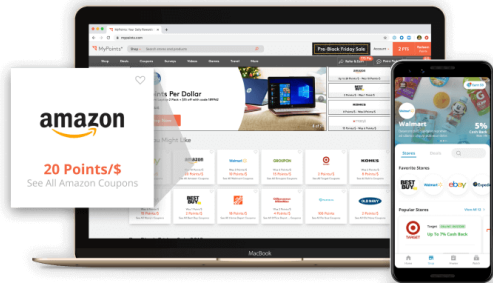
Awards & Affiliations



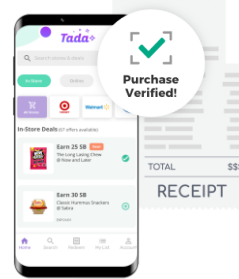
Prodege has been powering the largest market research companies in the world with expertise in complex programming, proprietary sample, project management, and online reporting tools.

Prodege's Unique Engagement Model

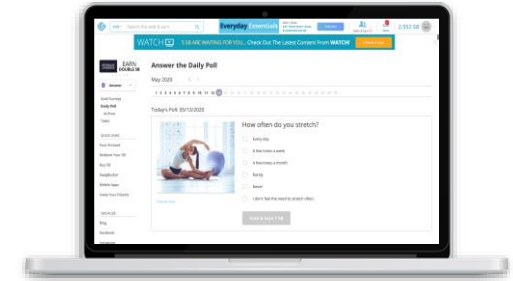
Shop



Receipt



Polls



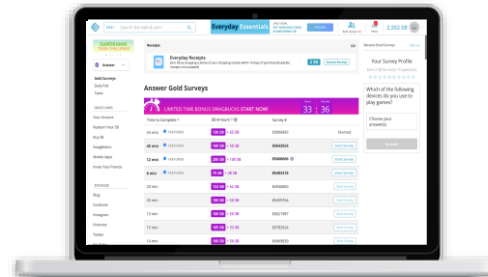
Offering our panelists a variety of ways to earn rewards beyond surveys fosters member retention and ongoing participation.

The benefits for clients are higher quality data, thoughtful responses (including detailed open-end responses) and industry-leading recontact rates.

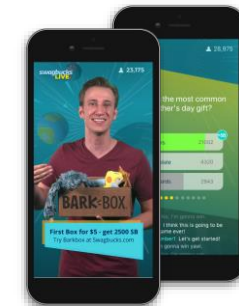
Watch



Answer



Play



About Treasury Wine Estates

Treasury Wine Estates is one of the world's largest wine companies with a portfolio of some of the most awarded and recognized brands in the world.



TREASURY
WINE ESTATES

Etude



19 Crimes.



MATUA

Penfolds[®]

STERLING
VINEYARDS.

Beaulieu Vineyard
SINCE **BV** 1900



BERINGER.
ESTD 1876

ESTD **B** 1876

BERINGER.
NAPA VALLEY



Stag's Leap



Clients We Serve

About



- Entrepreneurial research-based consultancy started in 2017.
- Mission to innovate and contemporize traditional research domains.
- Research philosophy, See the Big Picture, emphasizes perceptions in relevant context.



We are innovators who see the world broadly, fix our vision on your future opportunities, and drive actionable recommendations.



Learn more at
www.vistagrandestrategy.com

The Challenge

Treasury Wine Estates (TWE) needed to understand how shoppers decide what to buy in the incredibly complex wine category.

Traditional approaches such as shopper segmentation, path to purchase, and consumer decision trees have data limitations, lack deeper motivations, and provide a disconnected view.

TWE chose Vista Grande's Category Choice Architecture[®] framework to gain a holistic, interconnected understanding of the shopper.

A woman with short dark hair, wearing a light-colored blazer, is looking upwards and to the right in a wine store. The background is filled with shelves of wine bottles and several wine glasses on a counter.

**Who
is the
shopper?**

**Why
are they
shopping?**

**Where
are they
shopping?**

**How
are they
shopping?**

Choice Influenced by Perceptual Filters

Interconnected lens shaping our perception of choice

- Each of us perceives choice subjectively through powerful filters based on our identities, our needs, and our environment.
- We conduct our research among respondents in a shopper mindset.



Let's Meet Crystal

- 27 years old
- Lives in Chicago with her boyfriend
- Identifies as Hispanic
- Likes wine but more frequently drinks cocktails or hard seltzer, depending on the occasion
- Usually prefers her drinks to taste a little sweet
- Claims to be intimidated shopping for wine, not knowledgeable but interested in learning more
- Concerned about climate change and supports environmental causes
- Has steady employment but needs to be careful about spending too much—occasionally buys nice things



Who is the shopper?



Crystal Plans to Celebrate with Friends

- Crystal is getting together with college friends tonight to celebrate Naomi's work promotion
- They're meeting at Naomi's condo and ordering in Thai food from their favorite local restaurant
- Crystal said she'd bring a bottle of wine
- Wine felt like the most appropriate choice for this occasion (sharing a meal, recognizing her friend)
- She is looking for something a little extra special and is feeling anxious about getting the right thing

Why are they shopping?

Who will consume?

Herself and friends

Occasion / situation?

Celebrate special occasion

Need states?

Conviviality / recognition

Crystal Chooses to Shop at Binny's

- Crystal usually shops for groceries at Jewel Osco, which is conveniently located near her apartment
- She also likes shopping at Target and Trader Joe's, and sometimes orders drink delivery from Drizly
- But this trip is all about the wine for tonight's celebration
- She decided to shop at Binny's on the way to Naomi's because
- it has a great selection of quality wines and has knowledgeable staff to help her make a good choice

Trip mission?

On-the-go social occasion

Trip type?

Wine only trip

Retailer rationale?

Selection, fine wine, information, service

On this upcoming trip, where will you shop for wine?

Select one retailer

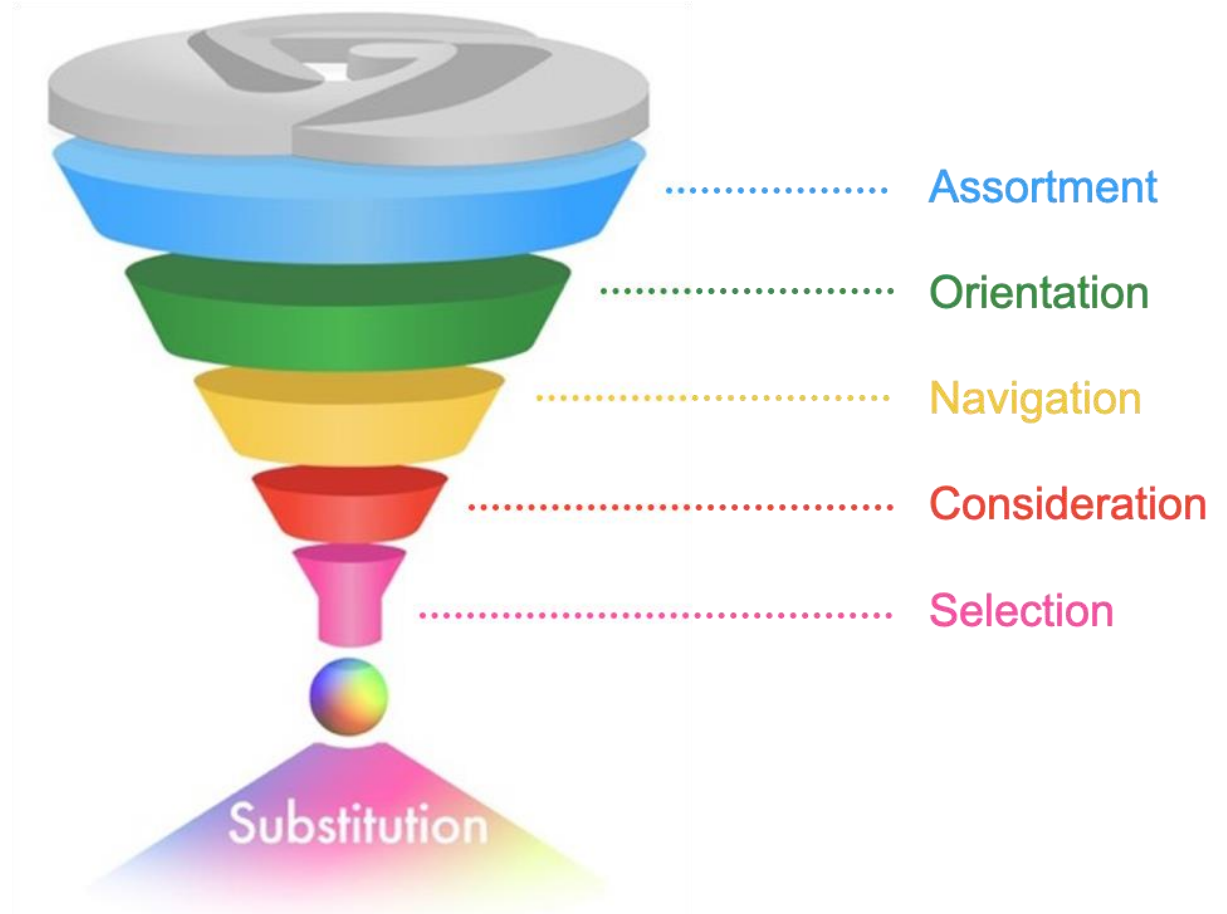
The image shows a selection screen with seven retailer logos in a grid. The logos are: Binny's Beverage Depot (highlighted with a green border), Drizly (bear logo), 7-Eleven, Jewel Osco, Target, Trader Joe's, and Walgreens. At the bottom right are 'Back' and 'Continue' buttons.

Where are they shopping?

Choice Occurs via the Shopping Funnel

Deselection stages amidst abundant choice

The process through which we seek relevance amidst an abundance of choice, often with time or budget constraints, culminating in a purchase decision we anticipate will meet our future needs.



How Crystal Navigated 5,000 Wine Options

Prodege programmed Vista Grande's proprietary simulation with a dynamic database of over 1,000 wines fielded among over 8,000 shoppers

How would you like to start shopping for wine?

Select one

- Price point** (per 750ml)
- Wine aged in a Spirits barrel**
- Non-Alcoholic**
- Country/State** (California, Italy, Australia)
- Size** (750ml, 3L, single serve)
- Brand/Winery**
- Lighter** (lower calorie, lower sugar, lower carbs)
- Color** (Red, White, or Blush/Rosé)
- Varietal/Appellation** (Chardonnay, Cabernet Sauvignon, Chianti, Rioja)
- Package Type** (Bottle, Box, Can)
- Domestic or Imported**
- Style** (Sweet vs. Dry)
- Organic/Sustainably Farmed/Biodynamic**

Funnel Stage	Attribute	Value(s)	Remaining Options
Assortment	--	--	1085
Orientation	Color	White	362
2 nd Filter	Size	750ml	320
3 rd Filter	Varietal	Chardonnay	134
4 th Filter	Geography	California	118
5 th Filter	Price	Over \$20 Under \$40	25

By quickly deselecting attributes less relevant to Crystal on this trip mission, she was able to form a consideration set of 25 wines.

Why Crystal Chose Stags' Leap Chardonnay

Please select the products you'd like to purchase on this trip. You will be given an opportunity to indicate the quantity of each product you'd like to buy in your shopping cart.
Add products to your cart.



Jordan Chardonnay Sonoma County - \$32.33



Grgich Hills Est Chardonnay California - \$37.01



Stags' Leap Winery Chardonnay California - \$22.36



La Crema Russian River Valley Chardonnay California - \$25.29



Trefethen Chardonnay California - \$25.29



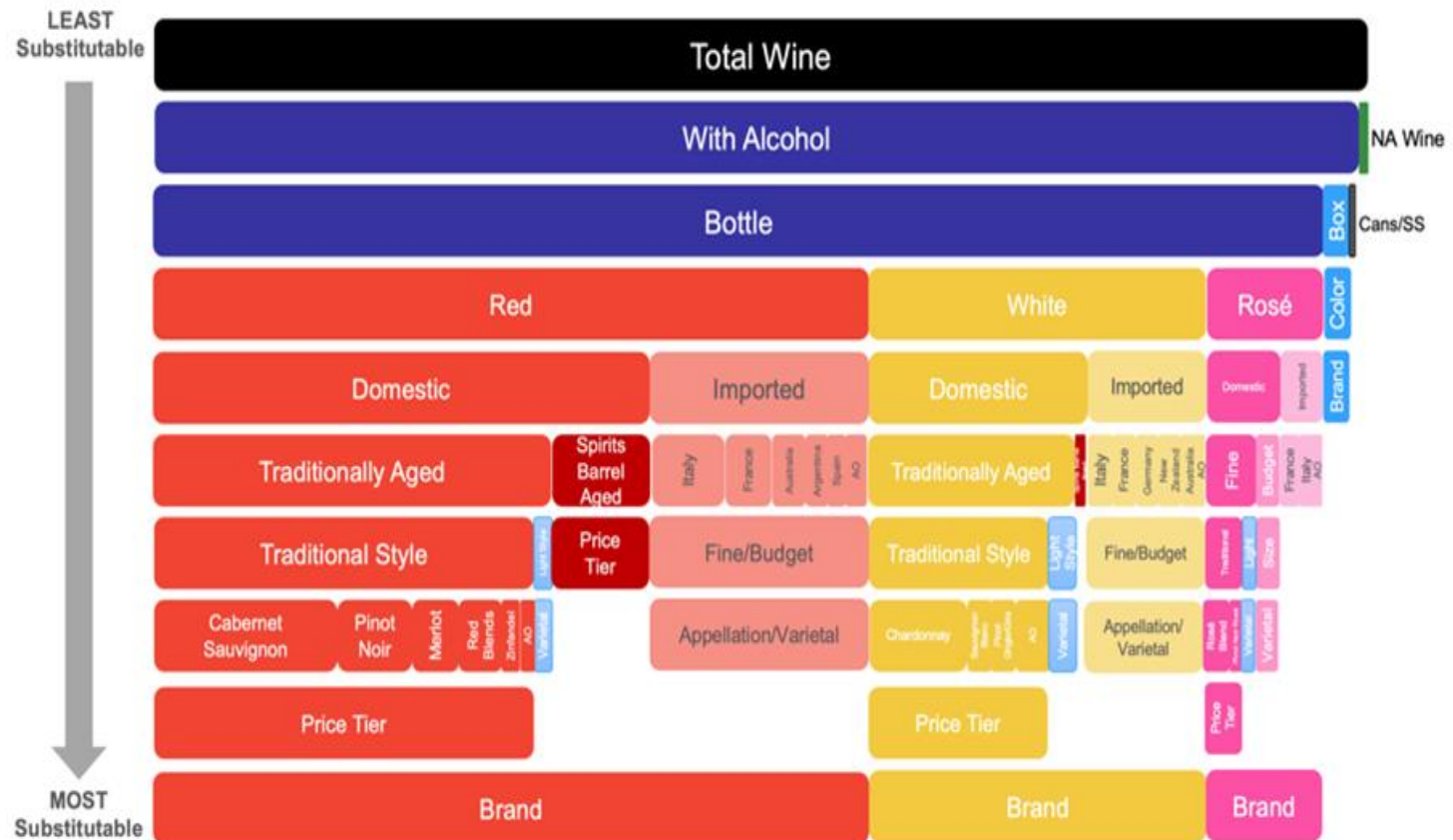
Rombauer Vineyards Chardonnay California - \$37.30



- She liked the understated label, which looked elegant and appealed to her sensibilities.
- The Napa Valley appellation on the front label would signal to her friends that the wine was high quality.
- The wine had a score of 94 points from James Suckling; tasting notes emphasized its freshness and acidity which would pair well with Thai food.
- She did a quick Google search on her iPhone and saw it had 4.7 stars with 33 ratings on TotalWine.com.
- The Binny's store manager told her that Stags' Leap was a great choice.

Over 8,000 Specific Simulated Shopping Trips Revealed Powerful Marketplace Insight

Category Choice Architecture[®] revealed points of connection among critical influencers of choice:



Some Key Learnings



- Luxury Wine shopping (>\$20) is much more about a **mindset** (mission, occasion, need-state) than about a demographic profile.
- Consumers believe wine fits in a wide variety of social occasions, and many shoppers are open to spend more for the right wine to meet their needs for that occasion.
- Many younger shoppers are intimidated by the complexity of wine terminology and are more comfortable choosing other alcoholic beverages such as hard seltzer and spirits-based cocktails.
Huge opportunity to better appeal to many younger consumers.
- These younger shoppers are much more interested in new benefits and experiences within the wine category. Examples include:
 - > Spirits Barrel Aged Wines such as Beringer Bros.
 - > Iconoclastic Labels & Celebrities such as 19 Crimes
 - > Healthy-Oriented Claims such as Matua Lighter
 - > Social or Environmental Responsibility Claims

What's Next?

- Continue to emphasize context in the expansion of Category Choice Architecture[®] and new, contemporized research services in traditional research domains:
 - > Consumer Segmentation
 - > Package Testing
 - > Innovation
 - > Brand Health Tracking
 - > Strategic Brand Assessment



Thank You!



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