

NYWGF RESEARCH - FINAL REPORT

Funding for fiscal year: 2023

SECTION 1:

Project title: *Teaching Consumers to Love NYS and Native/Hybrid Grape Wines. The Development of an Executable Education and Communication Strategy*

Principal Investigator with contact info:

Gregory A. Gardner, gardnega@potsgdam.edu, 315-412-4532

Co-PI Collaborators with contact info:

Lorraine Hems, lhems@saunders.rit.edu, 585-748-8584

Julie Purpura Martin, juliepurpura@yahoo.com, 585-314-9202

New Research **Continued Research**

Amount Funded \$9,830

SECTION 2:

Project Summary Impact Statement:

New York State wine producers and retailers desire to expand production and sales of these wines, including those made from native and hybrid grape varieties. Producers can only expand wine production, however, if they are able to find markets for the wines. This research explores the market for NYS and native/hybrid wines and offers specific guidance in marketing NYS and native/hybrid wines to consumers grouped into 3 levels of wine expertise. These result, condensed into sales guides and marketing advice sheets, will help wineries and retailers in NYS sell the wines the produce more effectively.

Objectives:

To understand, through primary and secondary research, the levels of awareness and impressions of New York State (NYS) wines and wines made from Native/Hybrid grapes on the part of wine consumers.

To describe, in executable detail, effective approaches for teaching/influencing wine consumers to appreciate wines made in New York State, as well as wines made from native and hybrid grape varieties.

Materials & Methods:

This research and instructional development included four steps:

1. The conduct of surveys among wine consumers regarding their levels of awareness of NYS and native/hybrid grape wines, as well as their other wine-related behaviors and their level of general wine awareness and understanding. Two specific populations were surveyed, using the same instrument. The first group was the membership of the American Wine Society. The second group was students at the Rochester Institute of Technology. A total of 312 responses were collected from RIT but only 24 responses were collected from AWS. This data was analyzed to better understand awareness and impressions of NYS and native/hybrid wines, to support the development of effective marketing/sales and training/educational approaches.
2. The development, conduct, and assessment of wine teaching experiences among wine consumers. These were accomplished at a set of three focus group experiences in Penn Yan, Rochester, and Utica. A total of 91 consumers were engaged, with each being offered an organized tasting of NYS wines made from native/hybrid grapes. These consumers were questioned and surveyed closely regarding their general awareness and impressions of NYS and native/hybrid wines, and their wine-drinking/wine-selection habits. The grapes and origins of the wines were not revealed until the end of the tasting. Responses were collected regarding the tasting experience and its impact on awareness of NYS and native/hybrid was assessed. This data was also analyzed to better understand awareness and impressions of NYS and native/hybrid wines, to support the development of effective marketing/sales and training/educational approaches.
3. Six wine retail professionals in NYS, including educators, bar/restaurant operators, and retail liquor store operators were interviewed, using an open-ended interview instrument, regarding their experiences with customers offered NYS and native/hybrid wines. These results were aggregated and trends extracted regarding most and least effective approaches and concerns/challenges with marketing these wines. These qualitative responses were compared to the qualitative and quantitative data collected in steps 1 and 2 of the research, to give a richer and more useful understanding of the approaches currently used by industry retailers to market these wines and the challenges to be overcome.
4. The results from steps 1 - 3 were integrated into a comprehensive approach to wine education and sales, based around assess levels of customer expertise on wine in general. The recommended approaches were shared with professional audiences at the BEV-NY professional tradeshow in March 2024, and commentary and assessments were solicited on the usefulness of the recommended approaches. Data from this presentation was used to refine and complete the development of the recommended approaches.

Results/Outcomes/Next Steps:

Impact of Expertise Levels as Key Elements in the Research Design

The research was developed around a division of consumers into three self-determined levels of wine expertise: Novice, Intermediate, and Expert. This research structure was selected based on the preliminary literature review.

In 2013, Sáenz-Navajas, et al conducted an experiment where consumers of various levels of expertise were asked to assess the quality of 12 red wines from Rioja in Spain and the Rhone region of France, using blind tasting. The research demonstrated convincingly that differing levels of expertise on wine and familiarity with the wines of the regions being tasted had a significant impact on how each consumer/taster assigned value and a likelihood to buy the wines. (Sáenz-Navajas, et al, 2013)

A 2017 examination of how consumers judged the quality of Beaujolais reds demonstrated that wine tasters essentially divide themselves into one of three categories – expert, intermediate, or novice. This research demonstrated that those with higher levels of experience in wine were more likely to judge wines against specific expectations based on awareness of what the wine should taste like, while those with less experience in wines were influenced more by specific sensory impacts. These results suggested to the authors that those with significant expertise in wines were more likely to be affected by an “internal script” when judging the quality of a wine, while novice wine consumers responded directly to sensory perceptions. (Honore-Chedozeaux et al, 2017)

Researchers in Australia in 2019 found similar results when measuring assessments of “complexity” in a set of varietal wines and two blended wines. They studied wine consumers/tasters at three levels of expertise in blind tasting, concluding that more experienced tasters were more likely to recognize complexity in a testable fashion while those with less expertise were influenced by their own sensory responses to each wine and were more often able to identify primary sensory responses rather than complex interactions between different sensory responses. (Wang and Spence, 2019)

In a 2019 survey of wine consumers in Central New York State by Drive Research, a Syracuse marketing research firm, respondents self-identified as wine experts, intermediates, or novices. Only 4% identified themselves as experts, with 67% identifying as intermediates and the remaining 29% as novices. (Taylor, 2019)

This suggests the need for a broad set of training/communication approaches for intermediates and novices, with some clear differentiation between the two market segments, as well as a very focused and specific plan for the experts, most of whom will be professionals in some aspect of the wine industry.

The surveys and focus groups conducted as primary research in this project asked each respondent/participant to identify themselves as either a Novice, Intermediate, or Expert, based on descriptions of each category. The surveys delivered a distribution of 22% Expert, 43.8% Intermediate, and 34.2% Novice.

The focus groups delivered a distribution of 17.8% Expert, 55.6% Intermediate, and 26.7% Novice. 88% of the RIT respondents reported themselves as 24 years old or younger, while all of the AWS Survey respondents reported themselves as being over 45 years old. The average age for all participants in the Focus Groups was 49.2 years old. The distribution of novice, intermediate, and expert in each piece of the research corresponded generally with the age of the respondent, with those identifying themselves as experts or intermediates as being significantly older than those identifying themselves as novices. See Tables 2A – 2C in Attachment 1 for summaries and of the Survey age distribution.

References

Honoré-Chedozeau, C. Lelièvre-Desmas, M. Ballester, J. Chollet, S. Valentin, D. (April 2017), Knowledge representation among assessors through free hierarchical sorting and a semi-directed interview: Exploring Beaujolais wines, *Food Quality & Preference*, Vol 57, Pg 17 – 31.

Sáenz-Navajas, M-P. Ballester, J. Pêcher, C. Peyron, D. Valentin, D. (2013), Sensory drivers of intrinsic quality of red wines: Effect of culture and level of expertise, *Food Research International*, Vol 54 Pg 1506 – 1518

Wang, Q.J. & Spence C. (2019), Is complexity worth paying for? Investigating the perception of wine complexity for single varietal and blended wines in consumers and experts, *Australian Journal of Grape & Wine Research*, Pg 243 – 251

Taylor, E (July 2019) 10 Findings from the Central New York wine survey, DriveResearch, <https://www.driveresearch.com/market-research-company-blog/10-findings-from-the-central-new-york-wine-survey-cny-wine-survey-results/>

Analysis of Each Level of Self-Reported Expertise

This section analyses the results for each group of respondents/participants, based on their reported level of expertise.

EXPERTS

In the literature reviewed for this research, those identified as “Experts” typically judged wine based on specific expectations for the wine beyond sensory experience. They were focused on the wine’s adherence to specific styles and influenced by perceptions of quality in wine-making that may not have reflected their personal tastes.

The Expert participants in the focus groups (17.8% of total participants), demonstrated similar response patterns to those in the literature. They were overwhelmingly likely to have professional experience with wine, with 75% reporting some professional experience. In this segment, 81.3% reported being very familiar with NYS wines and 81.3% reported being very familiar with wines from native/hybrid grapes. While 93.8% reported regularly drinking native/hybrid wines, only 18.8% identified a native or hybrid variety as a favorite. Over 70% identified a vinifera variety as a personal favorite. Their comments focused heavily on the quality of the wine-making rather than sensory experience in tasting. It was important to them that the wine was well-made, regardless of the grapes used, or their personal preferences.

The Expert respondents to the survey (12.4% of total respondents), were older than other levels of expertise, with 76.5% reporting professional experience in the wine industry. 27.8% of expert respondents reported being Very Familiar with NYS wines, while 58.3% were Moderately Familiar, and only 13.9% reported Little or No Familiarity with NYS wines. In the same group, 52.8% reported being Very Familiar with Native/Hybrid wines, while 41.7% reported being Moderately Familiar with Native/Hybrid wines, and only 5.6% reported Little to No Familiarity.

INTERMEDIATES

In the literature reviewed for this research, those identified as “Intermediates” typically judged wine based on sensory experiences, although often with more complex analytical vocabulary in describing these experiences. They were focused on the wine’s taste and smell and other sensory elements, rather than pre-tasting expectations of style, wine-making technique, or other aspects.

The Intermediate participants in the focus groups (55.6% of total participants), demonstrated similar response patterns to those in the literature. They were far less likely to have professional experience with wine, with only 20.8% reporting some professional experience. In this segment, 24.5% reported being very familiar with NYS wines and 13.2% reported being very familiar with wines from native/hybrid grapes. While 73.6% reported regularly drinking native/hybrid wines, only 13.2% identified a native or hybrid variety as a favorite. Over 86% identified a vinifera variety as a personal favorite. Their comments focused heavily on the tastes of the wines, and their pleasure at having a new wine experience or the discovery of these “new” grape varieties.

The Intermediate respondents to the survey (51% of total respondents), were younger than those with Expert levels of expertise and reported 1.4% professional experience in the wine industry. 4.8% of Intermediate respondents reported being Very Familiar with NYS wines, while 65.3% were Moderately Familiar, and 31.7% reported Little to No Familiarity with NYS wines. In the same group, 3.6% reported being Very Familiar with Native/Hybrid wines, while 43.2% reported being Moderately Familiar with Native/hybrid wines, and 51.8% reported Little to No Familiarity.

NOVICES

In the literature reviewed for this research, those identified as “Novices” typically judged wine based on sensory experiences, often with less complex analytical vocabulary than intermediates or experts. They were focused on the wine’s taste and smell and other sensory elements, rather than pre-tasting expectations of style, wine-making technique, or other aspects. They essentially judged wines based on whether they liked them or not.

The Novice participants in the focus groups (26.7% of total participants), demonstrated similar response patterns to those in the literature. They were far less likely to have professional experience with wine, with none reporting any professional experience. In this segment, none reported being very familiar with NYS wines or being very familiar with wines from native/hybrid grapes. 62.5% reported little or no familiarity with NYS wines and 91.7% reported little or no familiarity with native/Hybrid wines. While 54.2% reported regularly drinking native/hybrid wines, only 8.3% identified a native or hybrid variety as a favorite.

Over 45.5% identified a vinifera variety as a personal favorite, but with many others identifying brands or wine styles rather than specific grape varieties. Their comments focused heavily on the tastes of the wines, and their pleasure at having a new wine experience or the discovery of these “new” grape varieties. Levels of sweetness were commented on frequently.

The Novice respondents to the survey (44.9% of total respondents), were younger than those with Expert or Intermediate levels of expertise and reported 0% professional experience in the wine industry. Only 2.6% of Novice respondents reported being Very Familiar with NYS wines, while 33.9% were Moderately Familiar, and 63.5% reported Little or No Familiarity with NYS wines. In the same group, 1.8% reported being Very Familiar with Native/Hybrid wines, while 15.3% reported being Moderately Familiar with Native/hybrid wines, and 82.9% reported Little to No Familiarity.

Summary of Results of Interviews of Wine Retail Professionals

This section analyses the results of a set of 6 interviews of professional wine retailers regarding their experiences and challenges in selling NYS and hybrid/native wines to customers. These interviews were conducted using an open-ended question template. The goal was to collect qualitative data from retail experts in the field of wine. The respondents had an average of 11.17 years in the wine industry and were drawn from wine educators, restaurant and bar owners, and liquor store managers/owners, all operating in NYS.

What is the availability of NYS wines for you to bring into your store/restaurant?

Responses suggested no difficulty in obtaining NYS wines, although one respondent indicated that developing relationships with specific wineries was difficult.

What is your biggest challenge(s) with training your staff to promote NYS wines?

Responses focused on the need to educate consumers/customers on the NYS wines – cooler climate, with more acid and less sweetness than often expected. They also noted the need to overcome an expectation that NYS wines are generally sweet on the part of some customers.

Those retailers with rapid turnover of wines and/or menus (or employees), the challenge was the cost of constantly updating employees on NYS wines and wine styles. Most were unable to afford dedicated sommeliers to train employees or deal with customers. The employees themselves did not often drink NYS wines, as the drier styles were typically more expensive than comparable warm-climate mass market wines.

How frequently do you get asked for NYS wines by your customers?

This market was perceived as having softened since the pandemic. The higher price points of many NYS wines were also noted as a factor limiting demand. At least one retailer had an “all NYS” list, but concerns about price remained.

Do you feel that it is harder to sell NYS wines?

Most agreed that NYS wines could be a harder sell than international. In general, American-made wines were often more expensive than international competitors. Some respondents reported customers as being unfamiliar with NYS wines and wines from Native/hybrid grapes in general. Used to selecting wines by vinifera grape variety, the customers are not aware of

NYS wines, with little name/brand recognition. The retailers depended on marketing materials to help sell the wines.

The lowest demand was identified as native/hybrid grapes and sweet wines, although some customers did specifically prefer sweeter wines.

Is it a challenge to sell NYS hybrids/native varieties?

The respondents generally claimed that selling these wines was easier than expected. Many customers did not care about specific grape varieties and could be convinced to buy a native/hybrid wine, especially when the price was lower than other NYS choices. One retailer reported success in selling these wines as “Local” rather than using the words hybrid or clone. The need for good storytelling with these wines was acknowledged and the importance of developing longer-term trust with customers would allow the retailers to sell wines based on recommendations, rather than marketing points.

Future trends/predictions?

Many popular wine styles, including natural, orange and Pet Nat were expected to maintain strong demand in the future. In general, the quality of NYS wines was expected to increase. NYS Rose was acknowledged as being at a very high quality and affordable price point and expected to increase. Interest in sparkling wines also expected to increase.

Customers were seen as looking for more casual opportunities to enjoy wine, as opposed to exploring the intellectual side of wine appreciation. Demand for lower-cost international regions, such as Portugal and Sicily was expected to remain strong, at price points of under \$12 a bottle.

Summary of Retailer Interview Results

These responses suggest that most retailers encounter customers who have limited familiarity with NYs and native/hybrid wines, but that they can be encouraged to try these wines with adequate education on tastes, sweetness levels, and the value of the wine, even at a higher price point than expected. Those retailers with the ability to tell the story of a wine and educate their customers were able to sell NYS and native/hybrid wines, but training staff to do this selling was an ongoing challenge.

Analysis of Results to Inform Communications/Education Processes

This section analyses the results for each group of respondents/participants, based on their reported level of expertise, as the basis of our proposed approach to communicate and educate consumers and retail professionals in generating demand for NYS and native/hybrid wines.

EXPERTS

Experts represent a relatively small portion of the total wine market and market for NYS and Native/Hybrid wines, but they are customers for these wines and should not be discounted in developing sales/marketing plans. This segment is price sensitive, as are the others, but will at least occasionally spend more on a wine than other segments. Among survey respondents self-identifying as Experts, 48.9% reported \$11 - \$20 as the most common price paid for a bottle of wine to be drunk at home, however 6.7% reported spending \$50 or more.

Experts are older than the other categories, with an average age of 51.6 years among Focus Group attendees and survey respondents reporting 91.7% above 54 years old. Experts are also far more likely to have current or past professional experience in the wine industry. They tend to judge wines based on perceived quality of production rather than on specific sensory experiences. They rate well-made wines, regardless of grapes or area of origin, above those that offer a preferred sensory experience. They are already broadly aware of NYS and Native/Hybrid wine choices.

The best sales techniques will focus on the wine's quality and adherence to expected styles or demonstrating the use of specific techniques. Experts may be generally familiar with native/hybrid wines and NYS wines, but they may not be familiar with any specific wine and may be encouraged to try something new. When selling to these customers, stress the quality of the wine's production and why it is better than other Native/Hybrid or NYS choices at a similar price point. Be familiar with the wine-maker and understand the wine's style and the production processes used. Pay attention to the vintage and how it has affected the wine. Sunny year? Cold? How long has the wine been in the bottle? How long aged before bottling? Why is this wine better than comparable competitors?

INTERMEDIATES

Intermediates represent the largest portion of the total wine market and market for NYS and Native/Hybrid wines, but they present some special challenges to wine retailers as they are the most diverse customers addressed in this report. This segment is price sensitive, as are the others, and will seldom spend large amounts on a bottle. Among survey respondents self-identifying as Intermediates, 14.4% reported \$10 or less as the most common price paid for a bottle of wine to be drunk at home, while 62.6%% reported \$11 - \$20 as the most common price paid. Only .7% reported spending \$50 or more.

Intermediates are more age-diverse than the other categories, with an average age of 53 years among Focus Group attendees and survey respondents reporting 87.2% below 25 years old. The range of ages in the Focus Groups for Intermediates was 48 years, with respondents as old as 73 and as young as 25. Intermediates are also far less likely than Experts to have current or past professional experience in the wine industry. They tend to judge wines based on sensory experiences. Most will judge wine based on some systematic understanding of flavor and aroma, but this group can have very different levels of real wine

knowledge and experience. This group often reports seeing wine as a beverage and part of a general lifestyle, although they can also respond to wine as a specific experience.

The best sales techniques will focus on relating the wine to food, hospitality, or other lifestyle aspects, although describing a particular wine as a unique experience can be effective as well. This segment varies tremendously in their real awareness of NYS and Native/Hybrid wines, so do not assume that they really know as much as they may imply, especially regarding Native/Hybrid wines. Relate the Native/Hybrid wines to better-known Vinifera choices. Ask the customer what they prefer in wines and what vinifera varieties they most prefer, then try to pair NYS and Native/Hybrid wines based on taste and aroma, as well as pairings with food. Some retailers report success in calling the wines “local” rather than Native/Hybrid and avoiding words like “Hybrid” or “Clone”. Be prepared to tell the backstory of a wine – where it is from and elements such as being bio-dynamic, organic, or using unusual techniques in production, such as amphora aging/fermentation. Relate these to flavors and aromas in the wine.

NOVICES

Novices represent about one quarter of the total wine market and market for NYS and Native/Hybrid wines, but they report spending less on wine than the other segments. This segment is price sensitive, as are the others, and will seldom spend large amounts on a bottle. Among survey respondents self-identifying as Intermediates, 18.3% reported \$10 or less as the most common price paid for a bottle of wine to be drunk at home, while 58.3% reported \$11 - \$20 as the most common price paid. Only .87% reported spending \$50 or more.

While this segment is relatively small in comparison with Intermediates, its youth suggests that retailers can capture some of these Novice wine consumers as customers for life, making the segment worth serious targeting. If Novice customers can be convinced to include wine in their lifestyles more frequently and to gain some more detailed understanding of the product, they may become a very remunerative market segment.

Novices are younger than the other categories, with an average age of 40.5 years among Focus Group attendees and survey respondents reporting 97.4% below 25 years old. The range of ages in the Focus Groups for Novices was 40 years, with respondents as old as 61 and as young as 21. Novices are also far less likely than other segments to have current or past professional experience in the wine industry. They tend to judge wines based on sensory experiences, but often with little science or detailed awareness. Most will judge wine based on their personal response to it. “Do I like it or not?” This group often reports seeing wine as an experience and an opportunity to learn, rather than as a beverage to be enjoyed regularly.

The best sales techniques will focus on describing the wine as a unique experience. It could be something shared with others, something new to try, or a chance to be different in social situations. This segment typically has only limited experience with any wines, and is more likely to choose by brand name or packaging, rather than grape variety or place of origin.

When promoting NYS or Native/Hybrid wines, relate them to specific tastes and food flavors. “Do you like sour candies? Then try this Marquette. It will remind you of those candies.”

When telling a wine's backstory, talk about issues that can be related to values, like climate change or a commitment to organic farming. Being owned or made by a woman or by someone with a unique personal story that brought them to wine-making. This segment often prefers cocktails or craft beers or ciders to wine and may prefer sweeter wine types, regardless of the food they plan to pair. They can be confused by complex details of taste, grape varieties, or wine-making techniques and prefer to identify a wine brand they can choose often, rather than developing a more sophisticated understanding. They often welcome the opportunity to learn in fun social situations, however, and can be a great market for events that involve wine-tasting.

Technology Transfer Plan:

The "technology" to be transferred in this project is the understanding of the role of expertise levels in the selling of wine in general and NYS and Native/Hybrid wines in particular. This is delivered most effectively through the sales/education guides identified in Attachment 2. These can be used by wine retailers in a variety of settings to help identify customers by their levels of expertise, and to craft sales/marketing approaches aimed at that specific expertise level – Novice, Intermediate, or Expert.

The full report, and the Marketing/Education guides will be delivered to the retail industry using 3 approaches:

1. These materials will be included in the websites of the individual researchers in their university pages, as well as through Wine Knot Experiences and consulting. Links can be provided to the NYWGF website as well.
2. The presentation of preliminary results and recommendations at the 2024 BEV-NY conference in March 2024 resulted in many requests for the final results and materials, on behalf of retailers and related professionals. The materials will be shared electronically with those identified through the BEV-NY conference.
3. The investigators plan an academic article as well, submitted to one or more peer-reviewed wine journals, as well as a trade article in a New York trade venue.

Attachments:

Attachment 1 – Charts and Tables

Summary of Focus Group Data by Level of Expertise

EXPERT	17.8% of Total	Very Familiar	Moderately Familiar	Little to No Familiarity
Average Age	51.6 years			
Professional Experience	75%			
Familiar w/NYS Wines		81.3%	27.8%	0%
Familiar w/Native and Hybrid Wines		81.3%	27.8%	0%
Regularly Drink Native/Hybrid	93.8%			
Favorite grape variety is native/hybrid?	18.8%			
INTERMEDIATE	55.6% of Total	Very Familiar	Moderately Familiar	Little to No Familiarity
Average Age	52 Years			
Professional Experience	20.8%			
Familiar w/NYS Wines		24.5%	32.1%	7.5%
Familiar w/Native and Hybrid Wines		13.2%	45.3%	32.1%
Regularly Drink Native/Hybrid	73.6%			
Favorite grape variety is native/hybrid?	8.3%			
NOVICE	26.7% of Total	Very Familiar	Moderately Familiar	Little to No Familiarity
Average Age	40.5			
Professional Experience	0%			
Familiar w/NYS Wines		0%	37.5%	62.5%
Familiar w/Native and Hybrid Wines		0%	8.3%	91.7%
Regularly Drink Native/Hybrid	54.2%			
Favorite grape variety is native/hybrid?	8.3%			

Table 1

Summary of Survey Data for EXPERT Respondents

EXPERT	38.5% of Total	Very Familiar	Moderately Familiar	Little to No Familiarity
Age				
18 – 24 Years	5.6%			
25 – 34 Years	0%			
35 – 44 Years	2.8%			
45 – 54 Years	0%			
55 – 64 Years	25%			
+65 Years	66.7%			
Professional Experience	76.5%			
Familiar w/NYS Wines		27.8%	58.3%	13.9%
Familiar w/Native and Hybrid Wines		52.8%	41.7%	5.6%
Regularly Drink Native/Hybrid	54.1%			

Table 2A

Summary of Survey Data for INTERMEDIATE Respondents

INTERMEDIATE	49.2% of Total	Very Familiar	Moderately Familiar	Little to No Familiarity
Age				
18 – 24 Years	87.2%			
25 – 34 Years	2.0%			
35 – 44 Years	0%			
45 – 54 Years	1.4%			
55 – 64 Years	2.0%			
+65 Years	7.4%			
Professional Experience	1.4%			
Familiar w/NYS Wines		4.8%	65.3%	31.7%
Familiar w/Native and Hybrid Wines		3.6%	43.2%	51.8%
Regularly Drink Native/Hybrid	51%			

Table 2B

Summary of Survey Data for INTERMEDIATE Respondents

NOVICE	38.5% of Total	Very Familiar	Moderately Familiar	Little to No Familiarity
Age				
18 – 24 Years	97.4%			
25 – 34 Years	2.6%			
35 – 44 Years	0%			
45 – 54 Years	0%			
55 – 64 Years	0%			
+65 Years	0%			
Professional Experience	0%			
Familiar w/NYS Wines		2.6%	33.9%	63.5%
Familiar w/Native and Hybrid Wines		1.8%	15.3%	82.9%
Regularly Drink Native/Hybrid	30.4%			

Table 2C

Attachment 2 – Sales Guides

Customer Assessment

What is Your Customer’s Level of Wine Expertise?

Seller’s Question	Novice Response	Intermediate Response	Expert Response
What is your favorite wine to drink?	Usually a mass brand or possibly admit that they don’t have a favorite wine. Or may be new to drinking wines (maybe beer, spirits and/or non-drinkers).	May offer a specific brand or grape variety. May also offer a general flavor or style – “dry” or “rosé”.	May relate the choice to pairings or other issues. They may not identify anything specific, but prefer regions or styles.
Have you visited any wine regions? If you are located in a wine region, ask them about other regions	Probably not. If they do identify a NYS region, ask for their impressions and any wines they remember trying.	Probably yes. If they mention any NYS regions, ask them about the wines and styles they enjoyed there.	Almost certainly, and often with multiple North American and international regions.
How do you decide which bottle of wine to purchase (label, grape, region, etc.)?	Typically recommendations from friends or a familiar brand or attractive label.	Often specific grape varieties or specific regions. May also have preferred brands.	Depends on the situation – pairings with foods, sharing with others, or specific wineries, wine-makers, or techniques.
How much do you typically spend on a bottle of wine?	Most reported \$10 - \$12. They may have trouble answering the question if they seldom buy wine.	\$10 - \$20 is the general range reported, but many will at least occasionally spend more. This is a function of age as well.	\$10 - \$20 remains a general response range but many will spend more on wines perceived as higher-quality, or from a winery they know and value.
How often do you serve wine at meals?	Never/seldom. May generally prefer other beverages – beer/cider or cocktails.	Occasionally - often. Wine may be more popular when entertaining guests.	Often, but not always.
When do you usually drink wine?	Typically associated with events and experiences. Social occasions or when seeking something new or different.	May be focused on social occasions/entertaining or may also include family meals at home, without guests.	Same as intermediates, but may also include professional activities or specific tasting experiences.

Novice Customers

Novices are typically younger than other segments of the wine market and have little or no awareness of New York State wines or wines made from native or hybrid grapes. If they have any experience with wine at all, it usually comes from some very well-branded mass market wines at low-cost points. This segment often prefers cocktails or craft beers/ciders to wine and may prefer sweeter wine types, regardless of the food they plan to pair. They can be confused by complex details of taste, grape varieties, or wine-making techniques and prefer to identify a wine brand they can choose often, rather than developing a more sophisticated understanding. They often welcome the opportunity to learn in fun social situations, however, and can be a great market for events and tasting experiences that involve wine-tasting.

Rather than attempting to explain wine details like grape variety or climate or style, present the wines you recommend as sensory experiences, along with compelling backstories on the wine that are tied to values and unique and interesting aspects of the winery or wine-maker.

Initial Question	Expected Response	Follow Up
So you are thinking about buying some wine today. What are the circumstances in which you might drink it?	Typically with friends or as part of a social occasion, perhaps with a partner. They may already know the event where they plan to drink the wine.	Ask about the event if it is known, or about how they see the wine fitting in with their general plans. “Are you interested in trying something new?”
Let’s figure out some wines that you and your friends might like. How do you take your iced tea or coffee? (Unsweetened, 1 tsp. sugar, 2 tsps., etc)	Most people can answer this question easily, describing the level of beverage sweetness they prefer.	Equate to Dry, Semi Dry, Semi Sweet, Sweet. Be prepared to recommend wines in that general level of sweetness.
What kinds of foods do you like? Vegetarian? Sweet? Spicy? Salty? Savory?	Most people will answer this by describing an ethnic/national category like “Asian” or by offering specific dishes. “Meat and potatoes” or “I don’t eat fish”.	If they are vegetarians, recommend low-tannin wines. Those who like spicy foods will typically do best with lower alcohol, fruitier and sweeter wines. Try older wines with savory. Sweet wines and desserts are classic.
Recommend a wine or wines that match the preferences you have uncovered. If you can offer them a taste before buying, pour the samples but explain/suggest some key flavors or aromas that they could experience.	They will probably assess the wines based on what they taste and whether they like them or not. Once they have selected a preference, they may ask about price, comparing it to mass	Take them into the backstory of the wine you are promoting. “Mass-market producers buy huge amounts of grapes from other commercial growers and as a result, their wines can be less expensive. This winery has been in the family for 3

	market brands they have encountered before	generations and their winemaker is the granddaughter of the founder. They grow their own grapes sustainably and are committed to paying their workers a fair wage. The wines are more complex than cheaper ones.”
Many of our customers are trying to live healthier lifestyles. They tell us they are trying to drink less but drink better. Some practice a dry January, for example.	They may agree with this, reply that it sounds like a good idea, or respond with humor but a recognition that health is important.	New York State is a cool-climate region, so its wines are often lower in alcohol and higher in acid, which makes them great with food and healthier than many other wines.
Many wineries in NYS are growing varieties that are more cold-hardy and disease resistant. Want to try some?	Probably yes, if you are offering a taste. Maybe not, if they have to buy a bottle untasted.	These grapes are becoming increasingly important as climate change is affecting grapes everywhere. NYS and other cool climate wine regions have been less affected than other warm climate regions like Australia or Italy. These grapes also allow growers to use less chemicals, as they are adapted to our biosphere.

Intermediate Customers

Intermediates are the largest segment of the wine consumer market, and the most diverse. Their real level of wine experience and knowledge can range from “almost a novice” to “almost an expert.” Like novices, they tend to judge wines based on sensory experiences. Most will judge wine based on some systematic understanding of flavor and aroma, but this group can have very different levels of real wine knowledge and experience. This group often reports seeing wine as a beverage and part of a general lifestyle, although they can also respond to wine as a specific experience.

When selling to intermediates, focus on relating the wine to food, hospitality, or other lifestyle aspects, although describing a particular wine as a unique experience can be effective as well. This segment varies tremendously in their real awareness of NYS and Native/Hybrid wines, so do not assume that they really know as much as they may imply, especially regarding Native/Hybrid wines.

Initial Question	Expected Response	Follow Up
What are some of your favorite wines?	This could be any combination of specific wines, branded or from specific wineries, or styles like rosé, sparkling, or “very dry”.	That’s an interesting range. What do you like most in those wines? Any wines you really dislike?
What are you thinking of with the wines you try today? Drink them at home? Or entertaining?	Probably both, as this group sees wine as a lifestyle choice.	Do you entertain a lot? Have you ever hosted a wine-tasting event at your house?
What kinds of foods do you like? Vegetarian? Sweet? Spicy? Salty? Savory? What do you like to serve when you entertain?	Most people will answer this by describing an ethnic/national category like “Asian” or by offering specific dishes. “Meat and potatoes” or “I don’t eat fish”.	If they are vegetarians, recommend low-tannin wines. Those who like spicy foods will typically do best with lower alcohol, fruitier and sweeter wines. Try older wines with savory. Sweet wines and desserts are classic.
How familiar are you with NYS wines? Do you have any favorite wineries?	Most will report some familiarity with at least one major region in NYS. They may report liking or disliking NYS wines in general. They may also complain about the cost of NYS wines versus warm-climate wines.	Climate change is actually helping some winemakers in NYS, while it hurts warm-climate producers like California or France. NYS reds are now compared to wines from European regions like Bordeaux or Germany. Small NYS wineries still cost more to produce than mass-market wines, but their quality is better and they are more unique and interesting.

<p>How familiar are you with wines from hybrid grapes? What do you think about wines made from Traminette or Chambourcin?</p>	<p>Expect some familiarity with at least few hybrids or natives. Also expect some resistance to these wines/grapes and replies that they do not like them.</p>	<p>Understood, but these grapes can make awesome wines.</p> <p>This hybrid variety wine has perfect balance, and pairs beautifully with lamb or pork. It is made by a young winemaker in the Finger Lakes who trained in Germany and is now doing great things with our wines.</p>
<p>Recommend a wine or wines that match the preferences you have uncovered. If you can offer them a taste before buying, pour the samples but explain/suggest some key flavors or aromas that they could experience.</p>	<p>They will probably assess the wines based on what they taste but influenced by what they expect from the wine. “Doesn’t really taste like a Chardonnay”. “I thought this would be sweeter.”</p> <p>Once they have selected a preference, they may ask about price, comparing it to warm-climate wines they have encountered before.</p>	<p>Take them into the backstory of the wine you are promoting. This winery has been in the family for 3 generations and their winemaker is the grandson of the founder. They grow their own grapes and that allows them try unique approaches like aging in amphora. The wines are more complex than cheaper ones.”</p>
<p>Many of our customers are trying to live healthier lifestyles. They tell us they are trying to drink less but drink better. Some practice a dry January, for example.</p>	<p>They may agree with this, reply that is sounds like a good idea, or respond with humor but a recognition that health is important.</p>	<p>New York State is a cool-climate region, so its wines are often lower in alcohol and higher in acid, which makes them great with food and healthier than many other wines.</p>
<p>Are you worried about climate change affecting your favorite wines?</p>	<p>Probably yes.</p>	<p>NYS is a cooler climate, so it is actually being helped by climate change in many ways. The increasing use of hybrid grapes is also making it easier to use fewer chemicals as the grapes are better adapted to local conditions.</p>

Expert Customers

Experts are the smallest segment of the wine consumer market, and the most likely to be/have been wine professionals in some capacity. Their real level of wine experience and knowledge is typically very high, although they may have strong areas of specialization. Unlike novices or intermediates, they tend to judge wines based on an appreciation of technical aspects and a comparison to their expectations of how a particular wine “should taste”.

When selling to experts, focus on the wine’s backstory and any aspects that make it unique, interesting, or of higher quality. This segment tends to be very familiar with NYS and Native/Hybrid wines, but is also willing to try them and buy them without the same bias that is sometimes found with intermediates. This can be a challenging segment to sell to, but they are human and have favorites and personal tastes like anyone else.

Initial Question	Expected Response	Follow Up
Are you in the industry? You seem to know so much about wine.	75% are likely to say “yes”.	What do you do in the industry? If the answer was “no”, how did you learn so much about wine?
How familiar are you with NYS wines? Do you have other regions that you prefer?	Most will say yes, but will also be able to discuss the specifics of multiple wine regions, old world and new.	What are your thoughts on cool-climate wines such as those from NY?
How familiar are you with wines from native or hybrid grapes? What are your impressions?	Most will say yes, or claim some familiarity, at least with specific grape varieties. Responses will typically include comments on how these wines are made or other aspects.	We see a lot of bias against these wines, especially from customers who have not had really well-made examples. NYS wine makers are doing some amazing things with these grape varieties.
We have a couple of really good examples of native/hybrid wines from NYS. Would you like to try them?	The answer will probably be yes, especially if you are offering an opportunity to taste before buying. You may get questions about the specific grapes or wineries.	Introduce the backstory of the wines, focusing on technical aspects and unique sensory appeals. When talking about the winery and wine-maker, focus on values and wine-making experience or philosophy.
What are your thoughts on climate change and its impacts on cool-climate regions like NYS?	Expect expressions of concern and awareness that climate change is not just about getting warmer.	I think NYS wines, like northern European regions, are actually benefiting from longer growing seasons. The varieties help because they are better adapted to local environments and more disease resistant.

General Marketing Suggestions Strategies and Promotional Approaches for Any Level of Expertise.

This section describes recommended organizational approaches to marketing NYS and native/hybrid wines, beyond the personal sales skills of staff.

Recommendation	Specifics
<p>Use your website and other online presence as a sales tool that differentiates your products and offers opportunities for each level of expertise. Share the unique character of your winery, restaurant, or store. Tell us why you are different from competitors.</p>	<ul style="list-style-type: none"> - Mission/vision statements that go beyond wine and address issues like the environment, health, or social issues. - The unique skills or background of wine-makers or chefs. Where they trained, wine-making experiences, woman or multi-generational/family owned? - Focus on organic, biodynamic, or other health/environmental themes. - Imagery of happy people and animals at work. The winery dog? The tasting room cat? Children in the vineyard or restaurant? It's not just about the wine. - Stress key quality points about wines or service.
<p>Staff training. This is expensive and difficult, especially with high turnover, but that staff is who really sells the wine.</p>	<ul style="list-style-type: none"> - Train your staff on wines other than those you sell, so they can respond to customer requests confidently. - Provide tip sheets on specific wines and bios and details on key wineries or other details. If your sales staff can't answer a question, they can look it up quickly; never make an answer up! - Invest in staff training available across NYS.
<p>Customer training. Novices and intermediates can enjoy learning more about wines and that confidence encourages them to buy/serve more wines. If you can help novices train up to intermediate levels, you could have a customer for life who will buy more wine and more expensive wines.</p>	<ul style="list-style-type: none"> - Offer expertise-appropriate wine tastings and pairing experiences for your customers. Novices, in particular, see wine as an experience more than as a beverage. - Develop a "Wine Profile" program for your customers, where you help them identify the wine styles and sweetness levels they prefer or which pair well with their preferred food choices. This profile is something they can use at other wine locations. You can use it to group customers by their preferences and tailor

	<p>experiences and other offering more specifically.</p> <ul style="list-style-type: none"> - Use your POS to keep track of customers and their orders. “Last time, you tried the sweet Moscato, and you seemed to like it. This time, would you like to try something similar, but a little drier and more complex?”
<p>Stop apologizing or trying to compare hybrids and natives to other vinifera. Embrace their uniqueness and be proud.</p>	<ul style="list-style-type: none"> - Use fanciful names/labels to attract consumers (Novice/Intermediate especially) to purchase regardless of the grape variety. - Let the customers taste before you share the details about grape history/DNA (ex. If it’s a hybrid/native relative). - Consider avoiding the names “native” or “hybrid” altogether. Instead, use names like “locally-adapted” or “proprietary” – things like “Beverly’s Blend”, or just use the original names of the grapes such as Chambourcin, or Marquette
<p>Pay attention to your pricing and offer some discounts or purchase incentives. All 3 levels of expertise tend to be price-sensitive, typically preferring wines at the lower end of the price spectrum. There is also frequently an expectation that NYS wines are more expensive than they should be, especially among novices and some intermediates who compare them to lower-priced mass-market wines.</p>	<ul style="list-style-type: none"> - Differentiate NYS wines by referencing quality aspects. These can include things like lower alcohol levels, higher acid levels that make the wine more food-friendly, more sustainable or locally-focused production, better environmental choices, etc. - Note that native/hybrid wines are more disease-resistant and can be produced with fewer chemicals and at a lower cost.

SECTION 3:

Project summary and objectives:

This project collected detailed quantitative and qualitative data from wine consumers and retail professionals regarding levels of awareness and impressions of NYS wines in general and wines made from native and hybrid grapes in particular. These results were used to develop specific educational tools and guidelines for use in training consumer-contact personnel in marketing NYS and native/hybrid wines to consumers, based on their assessed levels of wine expertise.

Importance of research to the NY wine industry:

NYS wine producers are interested in the opportunities and advantages offered by hybrid and native grapes. Consumers, however, are often resistant to trying or drinking these wines. This research identifies elements of consumer awareness and resistance to these wines and offers approaches to overcome this.

Project Results/next steps:

Most of the consumers surveyed or study in a focus group setting did not report disliking NYS wines in general or native/hybrid wines in particular. Wine novices and intermediates, however, often reported very little real familiarity with these wines, especially native/hybrids. They are not choosing these wines because they don't like them, but rather, because they are not familiar with them.

This research offers some recommended approaches to engage consumers in all three categories of expertise, to convince them to try NYS and native/hybrid wines. These approaches are described in practical terms in a set of sales guides that can be used to training sales staff at wineries, restaurants, and retail wine shops.