



# CAP for Wine

Content, Accessibility, Personalization

CAP for Wine is a framework for thinking about your wine program in three dimensions which together maximize the success of any wine program whether you are a restaurant, hospitality provider or retailer. CAP for Wine helps you assess the important aspects of your wine program and is a roadmap for building out enhancements and improvements over time.

The three dimensions of CAP for Wine are Content, Accessibility and Personalization.

CAP can inform you about your digital enablement strategy and requirements. How should you design your data model? What content do you need and how should it be structured to enable the accessibility and personalization you wish to add to your wine program?



## Content

Content is the starting point. What is needed and how it is structured. How your content is identified and designed can drive a roadmap of not only content, but also functionality over time. Content can be structured and designed in ways to provide a range of personalization experiences, e.g., is your customer a beginner, intermediate or advanced wine consumer.

### Content Fundamentals:

1. Producer of the wine. Producer or Brand name. This is a starting point of familiarity and confidence for many wine consumers.
2. The Name of the wine. Producers/Brands employ a variety of techniques to designate a specific wine in their portfolio with a name, e.g., a proprietary name, single vineyard name, reserve, estate, etc.
3. Wine Style Category: the most general classification of a given wine and the first indication of how a wine was made.
  - a. Red
  - b. White
  - c. Rose
  - d. Sparkling
  - e. Orange
  - f. Dessert
4. Where is the wine from – its place. This begins to tell “the story” about a given wine. It also provides context for both individual consumer preferences and new discoveries.
  - a. Country/State
  - b. Region
  - c. Sub-region/Denomination
  - d. Vineyard



## Content

### Content Fundamentals Cont.:

5. What is the wine made of – the grape(s). As with where the wine is from, what the wine is made of also begins to tell “the story” about a given wine. It also provides context for both individual consumer preferences and new discoveries.
  - a. Grape Varietal
  - b. Blend of Grape Varieties
  
6. Image of wine bottle or label. Either can be used and are commonly used. Where possible we recommend labels without bottles as they are larger and the labels can be read and related with much of the aforementioned content.

### Second Level of Content:

1. Food Pairing Information. Wine pairing with food is the most searched for wine related topic. My Wine Guide has developed a proprietary (patent pending) technology which enables food pairing information for any wine where the combination of region and varietal are known.
  
2. When was the wine made – the vintage. This relevant in several ways. Some wines are age worthy and as such their profile, aroma and flavor characteristics will change over time. Second, for super premium wines, their profile, aroma and flavor characteristics will vary year to year. Critic ratings and reviews will vary accordingly by vintage and are more relevant and accurate when referenced with the vintage reviewed.
  - Vintage
  - Non-vintage

## Content

### Second Level of Content Cont.:

3. Producer Supplied Tasting Notes. In addition to the review content provided by the wine critic organizations, descriptions of a specific wine’s characteristics, profile and vinification, e.g., Pet Nat vs Champagne method, maceration, carbonic, etc. can be obtained from the producer, sometimes published on the producer website in the form of tasting notes and technical data sheets. Note: Producer tasting notes and critic tasting notes can differ – significantly.
  
4. Graphical Tasting Notes Derived from Wine Critic Reviews. My Wine Guide’s patented proprietary algorithm applies Natural Language Processing technology to thousands of wine reviews provided by six globally renowned organizations. This technique results in a tasting profile of any wine that is entirely data driven and we believe more useful than any one particular opinion.

Light Bodied > Full Bodied	Ripe/Sweet > Tannic/Acidic	Earthy/Herbal > Fruit Forward
1 < -----5.6----- > 10	1 < -----5.6----- > 10	1 < -----4.5----- > 10

Dry & Crisp > Rich & Full Bodied	Citrusy > Savory	Mineral > Fruity
1 < -----6.3----- > 10	1 < -----5.1----- > 10	1 < -----5.1----- > 10

5. Producer Description. The producer/winery/owner background and description thereof is often the starting point of a wine’s story which sommeliers enjoy conveying. This is certainly the place for creative writing about a wine, its origins and fun facts.



## Content

### Third Level of Content:

1. Producer Attributes. Wine consumers are exhibiting a significant interest in a variety of ecology related topics for which wine producers can be certified, or self-designated, at various levels. The most common are:
  - a. Organic Wine
  - b. Organically Farmed
  - c. Biodynamic
  - d. Sustainability Certifications (there are many)
  - e. Vegan (both farming and/or wine production)
  
2. Wine Specific Attributes
  - a. Alcohol % ABV
  - b. Non-alcoholic
  - c. Optimal serving temperature
  - d. Allergens, e.g., contains sulphites
  - e. Calories
  - f. pH
  - g. TA
  
3. Wine Region Descriptions and Images. Beyond just the name of the wine region, descriptions can transport the consumer to the wine's place and region, often referred to as terroir. Region descriptions give consumers a sense of discovery, exploration and a way to relate to a wine aside from just taste.
  
4. Varietal and Blend Descriptions and Images. More than any other aspect of a wine, consumers relate and recall the grape or blend of grapes. As a result, educational descriptions of grape varieties are a popular topic and part of the wine's story.



## Accessibility

- Once content has been established its time to think about how to best access the content. We won't attempt to enter into UI design territory here. Rather we'll focus on several best practices for accessibility which underlie UI considerations.
- It's easiest to begin with thinking about the content consumers want to access as Content Variables and then prioritize them for your solution. They are:
  - Wine Style Category
  - Country/State>Region>Sub-region
  - Varietal/Blend
  - Price Range
  - Bottle Size
  - Producer/Wine Attributes, e.g., Organic
  - Vintage
  - Rating/Awards
  - Food Pairing
- Filtering. Once your Content Variables are established filtering is a common and well-established practice for accessing digital wine lists and inventories. Users should be able to select any one of the Content Variables to begin their filter and then successively apply any of the other Content Variables as they wish.
- Sort. Sorting can be overlaid on selected Content Variables as well as filtered combinations of Content Variables. Content variables which are suited for sorting are: Price, Producer/Brand Name, Ratings, and Match % (which we will introduce within the Personalization section).



## Accessibility

- Search.
  - Searching by Producer/Brand name is a basic form of access. The search return should list the available producer wines by name (where applicable), varietal and region. The search function should include the ability to add either or both of varietal and region along with the producer name.
  - Other Content Variables suitable for search are:
    - Wine Style Category, e.g., Rose
    - Country/State>Region>Sub-region
    - Varietal/Blend
    - Producer/Wine Attributes, e.g., Organic
    - Vintage
    - Food Pairing



## Personalization

Personalization drives loyalty, creates memorable experiences, enables new discoveries, increases cart size, margins and average customer spend.

Personalization not only requires knowing your customers interests and preferences but also means putting those interests and preferences into context. A noted sommelier once wrote – “wine tastes change at Waterloo Station.” Of course, they do. Dining at home on a school night, or a date night where your companion’s preferences matter more than yours, or a special occasion and night in the city. When it comes to wine preferences, context means budget, occasion, tastes, and not the least of which, one’s food.

My Wine Guide’s patented personalization engine and algorithm, SommOne, bridges together an individual’s preferences with a fingerprint profile of virtually any wine made in the world.

### The Preference Profile

An individual’s preferences are built initially (the baseline) and update automatically over time. We start with a 30 – 45 second questionnaire, or wine quiz. No, we do not ask you how you like your coffee or your chocolate let alone ask the same questions to determine what red or white wines you’ll like. There is simply no proven predicative efficacy to those approaches. Our questionnaire is question and answer dependent and has over 300 distinct overcomes each for red and white wine preferences. We can quantify on a scale from one to ten whether you’re a beginning wine drinker, an advanced one or in between. We continually assess and evaluate our predictive results against fifteen wine consumer personas. We can also apply Persona-based analytics to help you assess the consumer positioning your wine program.

SommOne can incorporate past purchase history both to supplement the initial baseline and continually update an individual’s Preference Profile. However, we do caution against overweighting with past purchase history unless the purchase history comes from multiple sources. Consider someone who buys their expensive Pinot Noir from one source and their inexpensive Chardonnay or Sauvignon Blanc from another source. SommOne incorporates an individual’s ratings and recommendations/shares with friends, the latter of which seems to be more popular in our data than taking the time to rate a given wine. Overtime, as an individual’s Preference Profile is further defined, SommOne can ask additional questions in order to further clarify preferences.





## Wine Traits

Someone once said, “no one has tasted all the wines in the world, but someone has.” While we won’t disclose in this white paper (happy to do so under NDA) the proprietary technology of SommOne, we will share a view into its predictive efficacy.

Firstly, we should point out the technology on which SommOne is based is entirely data driven. We do not rate nor review wine. We leave the data that drives SommOne to the experts. That said being software and math geeks we do choose the variables which just like all good predictive models (whether it’s the weather or the economy) are constantly evaluated and modified with – more math and focus groups, etc.

Our research and data tells us the most predictive modeling of wine preferences is based on - where is the wine from and what is it made of. Wine is about place – Terroir. For anyone of us in the wine industry we know this but until My Wine Guide no one put this into an entirely data-driven, predictive model.

For any wine in the world, SommOne can profile the wine according to six variables for white wine and seven variables for red wine – in less than a second. The resulting profile of the wine is a set of numbers which can then be matched with the numbers associated with any individual’s Preference Profile. Lastly, as mentioned above, we then put all of this in the context of the wine consumer’s budget, occasion, and food.

## Wine Exploration and Discovery

While SommOne might provide you with a perfect wine to match your preferences that’s not our main mission. Our mission is to open up the world of wine to the everyday consumer. And to do so with an experience which encourages exploration and leads to new discoveries - instill a beginner with confidence, lead a casual but frequent wine consumer to “get out of their comfort zone” or give a table of six everyday diners a reason to talk about wine.

Everyone wins. We not only sell more wine and increase wine incidence, but we also drive higher margins with higher priced wines, and turn all inventory faster including “hand sell” wines. Little known producers, unfamiliar, faraway wine regions and uncommon varietals get the exposure they deserve. One hundred dollars of groceries turns into \$150 of groceries and two bottles of wine. Wine consumers are certainly among your most profitable customers and when it comes to your bottom line, the more, the better.