



Virtual Wine Tastings Become Key Consumer Engagement Tool

With many tasting rooms ordered to close due to novel coronavirus concerns, wineries turn to social media and meeting platforms to keep their club members connected with their brands via virtual tastings, though some are using it to reach new consumers. Here's how they're doing it.

Erin Kirschenmann

CLOS DU VAL

WHEN CALIFORNIA'S GOVERNOR ORDERED the closure of all winery tasting rooms, bars and restaurants to the public, tourism came to a screeching halt, forcing the wineries in the state to come up with innovative ways to keep sales moving.

Traditional direct-to-consumer sales through the tasting room stopped, though many wineries reported a dramatic increase in e-commerce purchases. While curbside pick-up and hand-delivery became popular options, those were only solutions for local customers, and wineries needed to engage and reach club members and loyal purchasers hunkering down many miles away. Shipping deals and discounts became de rigueur, but wineries wanted to engage and offer more than just \$1 or complimentary shipping.

As physical, in-person meetings are banned and most Americans are sheltered in their homes, many have turned to the digital world to facilitate some semblance of socialization—the wine industry is no exception. With

the desire to remain connected and less isolated, Zoom, FaceTime and other online meeting platforms skyrocketed in popularity. Wineries swiftly took note and the rise of the virtual tasting as a regular offering began.

Some of the first wineries to launch virtual wine tastings heralded from the Napa and Sonoma regions—two of the more traditional wine areas that rely heavily on wine and tourism industry dollars. If their customers couldn't come to them, they would bring wine country to their consumers. Once the initial rush to deliver a digital tasting passed, wineries invested in better tools, worked out the kinks and produced high-quality content across a few different platforms. They created virtual tasting packages, updated websites to facilitate easier e-commerce sales and diversified their programming.

Three types of virtual tastings emerged: The Personalized Tasting, The Live Stream/Group Tasting and The Happy Hour. Each evolved to fulfill a distinct need and to reach different categories of consumers. Some are geared toward



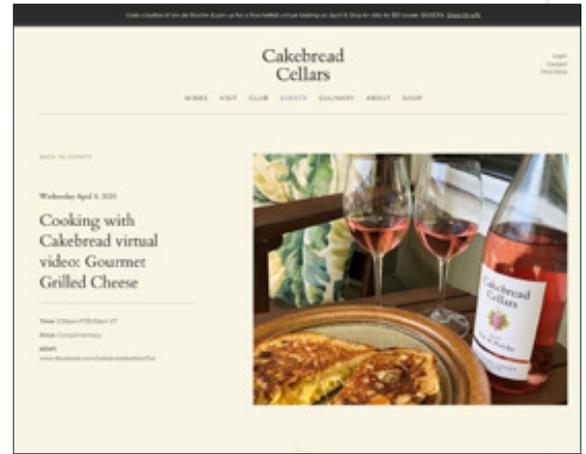
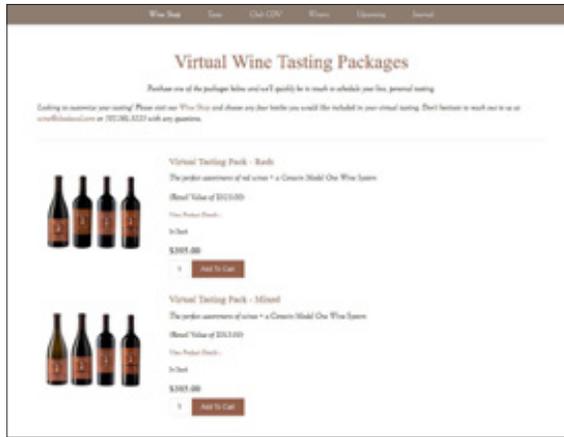
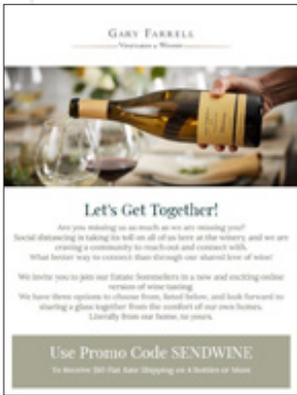
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Many wineries, like Gary Farrell Vineyards & Winery and Clos Du Val, developed special wine sets to accompany guided digital tastings. Others, like Cakebread Cellars, launched events that highlighted a wine and culinary pairing.

the loyal club member while others hope to engage a broader audience. According to Sandra Hess of DTC Wine Workshops, the best practices, technologies and sales packages can differ widely based on the model, but no model is inherently better—some are just better suited to each brand.

This article will look at the benefits and pitfalls of each type of tasting experience, best practices as well as the technology platforms needed, and how a handful of enterprising wineries have delivered on their digital promises.

The Personalized Virtual Tasting

Think of the Personalized Virtual Tasting as the intimate, wine-club only room of a traditional tasting room. Essentially a one-on-one tasting, this is meant to interact with audiences on a decidedly personal level and re-engage wine club members and brand loyalists.

For Shannon Muracchioli, director of marketing and DTC at Napa Valley's Clos Du Val Winery, a virtual tasting offering was a no brainer for her brand—and something she had been thinking about for a while.

"The funny or not so funny thing is it's been one of those items that's been up on the whiteboard in my office for a few weeks now. What I think the industry is trying to figure out is how you engage with your customer and stop expecting, especially from a DTC perspective, the customer to come to us? And that's not a new line of conversation. I think it's been going on for a few years, and the intensity of that conversation continues to pick up," she said. "I knew we needed to move forward on this and now it was the time to move it to the front burner."

Currently, Clos Du Val offers a virtual tasting experience at no additional cost to anyone who purchases four or more bottles at once or purchases one of two pre-determined four-bottle packages: one with red wine only and another that includes white wine. Included in those pre-set packages is a Coravin device at no additional cost to the consumer, but with the "at cost" price built into the package. By including the Coravin, she's hoping that her consumers, many of whom might be isolating alone or with one other adult, don't feel as if they need to pop the cork on all four bottles at once.

Once the purchase is made, the consumer receives an automatic email confirming the order and providing a link to reserve a "tasting" online. The customer chooses their time and a CDV employee follows up with a personalized menu and tasting sheets.

Using Zoom, the Clos Du Val host will then lead the consumer through a tasting, virtually. "The environment will be exactly the same [as if they were at Clos Du Val], where the host will have the wine and be able to talk and be able to get up and show them pieces of the property," she said. "That's the other great thing about Zoom. It can be on your phone or a tablet, so we walk them around the cellar, walk them around the vineyards if we're on property—if we're allowed to be on property."

To help prepare her employees for this new type of experience, she set each of her hosts up with a Zoom account and did a few practice runs with them, providing guidance on where to look, what type of lighting to use and where to place it, and how to be more comfortable on camera. "Outside of those technical details, really they just need to do what they do best and be themselves," Muracchioli said.

While it's still early days for the winery, Muracchioli is optimistic that this will continue to evolve. "Now we're fully into a learn-by-doing process and that is the way it has to go. And I'm grateful that I have a team that's super comfortable with adjusting on the fly and making sure that we learn from every engagement and from every consumer comment," Muracchioli said.

Lindsay Hoopes, the proprietor of her family's winery, Hoopes Family Vineyards in Napa Valley, wanted to use a virtual tasting to bring awareness to the brand. She knew that she had to bring in specialized programs and open a direct dialogue with Napa to build that awareness and Zoom became her preferred platform.

"I wasn't sure how popular they would be because for people coming to Napa, it's about being in a different location with different vineyard views. I was skeptical at first," she said, adding that she has since become a convert. "I think for people who really do love wine this is the way they can stay connected."

During the first few weeks of the local shelter-in-place, she hosted a lecture, with wine tasting included, for students in a local college's wine MBA program. Hoopes is also starting to work with corporate clients, offering a guided tasting for their employees.

Hoopes is also partnering with chefs to create pre-recorded tutorials on recipes that pair well with her wines. "We're replicating the recipes to show that they are easy to execute at home, while talking about the pairing aspect," she said, adding that it was important to her brand to connect the wine with the culinary experience.



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Best Practices for This Type of Virtual Wine Tasting

The offerings from Clos Du Val and Hoopes are great examples of a digital version of a seated tasting; it's highly targeted to a specific guest and delivers one-on-one engagement.

According to Hess, the key to delivering a premium experience in this setting is to focus on the relationship. "Those are great opportunities for smaller, more intimate events, where camera share and interaction need to be higher," Hess said. "It's very much a two-way interaction."

Virtual tastings of this kind are best used on platforms like Zoom, GoTo-Meeting, Webex, FaceTime or other meeting software. "They're pretty reliable in terms of the environment. You have the streaming piece, the real-time live video interaction, etc., that I believe so far has launched the success of the private tasting experiences that are being offered," Hess said.

It even appears that the learning curve on meeting platforms isn't as steep as it used to be. Zoom recently reported that daily active user counts were up 378 percent and monthly active users were up about 185 percent. As more Americans learned (or rather, were forced) to work remotely, it seemed that their willingness to participate on platforms for non-work related meetings increased as well.

"One reason we're launching with Zoom is because there's some familiarity already, I think both internally as well as for any consumer that works in a business environment," said Muracchioli. "For us it seemed to be an easy one to start with, as far as allowing different hosts and having people engage in it."

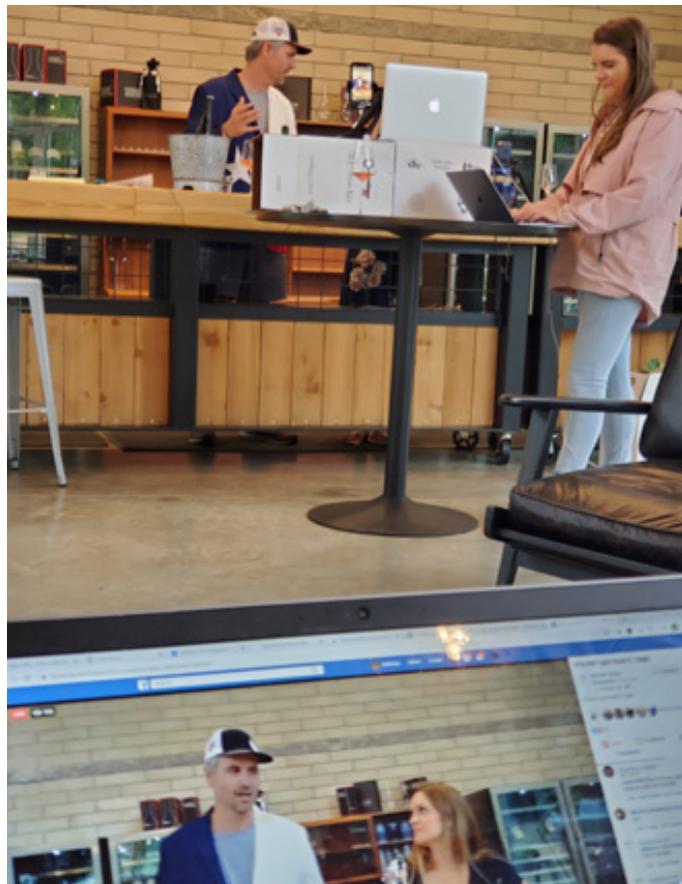
Because this type of tasting is dependent on engagement, there are a couple things to keep in mind when using platforms like Zoom. As Trey Busch, co-owner and winemaker of Sleight of Hand Cellars in Walla Walla, Wash., discovered, bringing in more than a dozen people onto a call can spell disaster. "Everyone's windows show up and it's fun to see them and have a conversation, but anything more than 15 is too many to talk to each other," he said. "That's the limiting factor in this; everyone wants to talk at the same time."

Some other tips to remember when delivering this tasting, according to Hess:

- Tasting time: Private, interactive tastings should last a minimum of 45 minutes to truly deliver that premium experience.
- Follow-up after the tasting to thank the guest, and perhaps offer them a complimentary tasting when they visit the winery next, to help build brand loyalty.
- Create a package (e.g., "Buy these four wines and we'll include the virtual experience") but don't limit it to expensive sets.
- Including a Coravin in the shipment is highly encouraged if a multi-bottle purchase is required. Or, offer multiple meeting sessions with each focused on a different bottle.
- Convert your online registration software to show virtual tasting experience times and availability.

The Live Stream/Group Tasting

The less formal cousin of the Personalized Virtual Tasting, the Live Stream/Group Tasting is the solution for those who want to reach as many people as possible. This type of virtual tasting spends less one-on-one time with viewers, though interaction is not impossible. It tends to be less scripted and more of a chance to for a winemaker or owner to tell stories, show off the brand and, in a pinch, serve as a wine club release party. The Live Stream Tasting has emerged as one of the most popular virtual tasting formats, simply because of the ease in which it can be done.



WILLIAM CHRIS VINEYARDS

Every Saturday, Chris Brundrett of William Chris Vineyards hosts a virtual tasting through Facebook Live.

Busch is a regular user and poster on Instagram, and posts "often enough to stay relevant" on Facebook. A smaller brand, he confesses to not have thought much about video in marketing. "We hadn't progressed to that level as a winery, but now that we're having to rethink everything, we're using it as a tool to talk to customers and it has proved to be really fun," he said.

He turned to Facebook Live to host his virtual group tastings, enjoying the ease of it as well as the high video quality. Because the video can be simultaneously streamed to Instagram Live, he can reach more than 8,000 followers at once. He saw some added value in helping the content have a longer shelf life, since Facebook can record the video and post to his wall, ready to be viewed whenever the consumer wants to watch.

For his first tasting, he set up in his living room, ready to go with the flow, hoping to spend 30 minutes "on air." "It went by a lot faster than I thought it would and it was more engaging than I thought it would be. I thought this wouldn't feel as personal, but it actually was," he said.

With his business partner Jerry Solomon monitoring the comments section so he wouldn't get sidetracked and off topic, Busch ended up running live for nearly two hours, talking about two of his club-specific wines and music, another facet in his brand—"Sleight of Hand" is the name of a Pearl Jam song, and his tasting rooms also serve as a library of more than 2,000 albums.

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“When we do a tasting, it is simply hanging out and talking about the wine and enjoying the scenery, and we tried to have that here.”

Art Murray, Flambeaux Wines

The tasting garnered some decent ROI for him as well. In his first edition, he had about 150 people who stayed for the entirety of the tasting. Of those, 100 or so were names that he recognized as great customers or great friends, so re-engagement with loyal customers was high, but he also had messages from new, potential purchasers, who requested to be added to his email list.

“We’re discovering new things about how to connect with the consumer because of this. It forced our hand in looking at new ways of reaching out to our mailing list and people who aren’t customers yet,” he said.

Similarly, Art Murray of Flambeaux Wines in Sonoma County turned to Instagram to connect with his followers, club members and fans—he also kept it informal and fun. “That’s our brand, that’s our style,” Murray said. “That doesn’t mean another way isn’t the right way—it’s just whatever fits your set up.”

He explored several platforms before settling on Instagram, where he has 13,000 followers, enjoying the ease of use and avoidance of technical issues. Interactivity was also important, and he loved that he could choose to bring up the video and audio of an audience member to join in and “speak.”

For his first tasting, he sat outside with his family with a beautiful vineyard as the backdrop, talking about the Flambeaux wine of the day, telling the story of the brand. He didn’t require any purchase from his audience; instead he asked them to bring their own bottle of wine (or something stronger) to share.

“We brought people in and asked them what they were tasting. When we do a tasting, it is simply hanging out and talking about the wine and enjoying the scenery, and we tried to have that here,” he said.

Like Busch, his first tasting went longer than expected. While he would prefer these tastings to run 15 to 20 minutes, he ran for nearly 40 minutes and says he saw great engagement. “The great thing about Instagram Live is you can see the analytics; you can see how long people are watching...you can see who jumped on and for how long.”

Murray will continue to use Instagram Live to drive new followers and engagement with his brand. “We’re thinking about trying to promote the live sessions and we’re going to do them every two weeks and see if we can build a little bit of a following and a little bit of understanding for who we are.”

Hoopes has been thinking about how to reach the next few wine-drinking generations and has invested heavily in social media content and brand presence, while also revamping the website. She is looking to go “Live” by leveraging the family’s rescue animal sanctuary, hosting virtual tastings while there. “It was a fun idea to create content,” Hoopes said. “We wanted to bring some levity to the situation and bring that fun tasting experience.” In the coming months, they plan to introduce the latest wine club shipment and new vintages live.

Best Practices for this Type of Virtual Wine Tasting

Because this format focuses less on having all participants on camera, pretty much any platform can be used. While we've so far focused on Facebook and Instagram Live, YouTube Live, Vimeo and any webinar function in meeting software can also be used.

If you decide to go the social media route, expect there to be some drop off in viewers. Murray said that he saw people tuning in for a minute or so and "that's the reality of it." This is more common on Instagram, as Instagram Live lives in the stories section of the platform, where users are used to short, 15-second snippets. Attention spans on the platform are much shorter than on Facebook, YouTube Live or Vimeo, where longer videos are more the norm.

Keep content current and regular. Viewers of this type of virtual tasting like to have a routine – they know to tune in every Wednesday at 6 p.m. for example. Many of the wineries WBM spoke with felt having a group tasting like this once a week or every other week was the right way to go, so long as the wines that are tasted or stories that are told are innovative and fresh.

While the platforms offer chat functionality, the heart of the live stream is a presenter or host presenting outward. It can be challenging for the host to be high-touch and still present a thoughtful and coherent tasting, Hess said. As Busch noted, it was helpful for him to have his business partner manning the comments, and any winery delivering group presentations should consider having someone dedicated to watching and responding to the questions and discussion happening there.

Hess also recommended posting a call for questions—ask people through your Stories or a post what questions they want answered. Write those questions down on index cards, along with who asked and where they're from, and give a callout on air. It will help alleviate some of the pressure of needing to answer all the questions in the chat live.

Hess said that the videos that see the highest engagement are those that feature couples. "The highest engagement and interaction, in comments and in views, are happening with husbands and wives and I love it because we're already quarantining together, they're already sheltered in place together so they can be really creative," Hess said, adding that, if possible, leverage the family to offer meaningful and relatable content.

The Happy Hour

It's 5:00 somewhere, right? While for many the concept of time has slipped a little during quarantines, the desire for a drink to celebrate the end of another workday has not. The Happy Hour Virtual Tasting has emerged as one way of engaging audiences while adding a bit of levity to a brand.

Like many other brands, William Chris Vineyards had been thinking about offering some sort of digital tasting option, according to senior director of marketing Leah Derton, but got a little extra push as the state closed winery tasting rooms. "We didn't have time to overthink or overengineer it. It was just, what's the best solution to engage and go live?" she said.



WILLIAM CHRIS VINEYARDS

This brand has incredibly engaged club members, so the team wanted to create a space for its members to hang out, connect and see a familiar face. Through Facebook Live, winery co-founder Chris Brundrett hosts a live virtual tasting of four wines (sold online as a variety pack) every Saturday. While he tells stories, the community can still talk to each other through the comments.

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Checklist: Practices that Make Sense No Matter The Tasting

- 1.** Check the WiFi. Speedtest.net is a great website to check the speed of your internet connection. As video and audio capabilities require a lot more bandwidth, see if you can plug directly into a modem rather than rely on WiFi. If that's not an option, use a dedicated network or make sure other users (co-workers, spouses, children, etc.) stay off the network at tasting times.
- 2.** Be mindful of your background. Whether the host is at the winery, in the tasting room, or at home, put some thought into setting up where there is plenty of light and, most importantly, a non-offensive background.
- 3.** Lighting is critical. Just like on any movie set, lighting and sound matter. Amazon has affordable lighting options (think \$30 to \$40), including ring lights, considered to be the most flattering. Consider a tripod and remote to keep movement to a minimum.
- 4.** Check the sound quality. Many have found that the audio quality on iPads and laptops is often better than on smartphones, but if you're broadcasting or streaming from a remote location, or constantly moving around, that may not be an option. Consider purchasing a small microphone from Amazon to ensure the best quality possible.
- 5.** Stagger your start times. As many users discovered in late March, meeting and social media platforms were overwhelmed and congested at popular meeting start times, such as 5:00 p.m., 5:30 p.m., 6:00 p.m. and 6:30 p.m., causing lag times and other audio/video quality issues. When this happens, providers need to switch new users and hosts onto different server farms. Hess suggested starting your virtual tastings at non-peak times, including 4:45 p.m. or 5:05 p.m. to ensure a smooth delivery.
- 6.** Give some thought to what you want to talk about. Don't expect to just turn on the camera and deliver high-quality content. Without creating a full script, think about what you want to say, the stories you'll tell, questions you can ask your audience and, most importantly, how you'll make it different from every other virtual tasting.
- 7.** Record the tasting to use for marketing purposes. Use the content to create clips, short videos and teasers that can be posted to social media or on your website. Remember, web pages with video often see better SEO than those with text only.
- 8.** Familiarize yourself with video editing software. QuickTime and iMovie are simple and free video editing software tools. You don't need to make an Oscar-worthy film, but it's easy to add title cards, cut clips and add subtitles (and any non-live video posted to social media should have subtitles) to extend the life of a tasting once it's over.
- 9.** Update your website to include the tastings and events. Consider your virtual tastings part of your event calendar and experience catalog. Make sure they're easily found on your website.



CLOS DU VAL

Though tasting from home, these Clos Du Val wine club members set up a formal wine tasting.

Additionally, every Monday through Friday at 5 p.m. fans new and old can also tune in to Facebook Live, where William Chris Vineyards' D Thompson leads a happy hour event. As the director of experiences and education at the winery and a certified sommelier, he's a natural teacher, and uses this opportunity to bring the wine school he runs for the winery staff to winery fans.

There's no pretense or pressure, as Derton puts it, and D loves to engage with the participants, giving shout outs to first time participants and, most importantly, ask the viewers what they're drinking.

The success in this type of virtual tasting is two-fold: it needs a charismatic and energetic host, and the content needs to consistently evolve so that watchers new and old feel like they've spent their time wisely. "The reason they are successful is because he features a new wine and topic every day while keeping the consistency and community aspect. It's a nice routine but with brand new content every day, with new things to learn," said Derton.

Topics for the 20- to 25-minute Happy Hour segment range from batonnage and what varieties grow well in the Rhône to how to choose the right glassware. Most of the content is geared to a broader audience, though he does dive into what he calls the "Wine Nerd" segment and geek out over some aspect of winemaking or viticulture. To add some levity and build a little action, he'll throw out a multiple choice question and let participants comment with the letter of what they think the correct answer is.

Supporting him are Derton and Anthony Harvell, director of sales and operations, as well as other tasting room employees, who monitor the comments and chats. They're tasked with answering questions like "Where