



CASE STUDY

HOPE FAMILY WINES: IDENTIFYING CHANGING CONSUMER PREFERENCES WITH DATA



KEY TAKEAWAYS:

- ❑ Hope Family Wines uses Dimensional Insight to help identify consumer preferences, which allows it to adapt quickly in a challenging economic environment.
- ❑ Several reports help provide the information Hope Family Wines uses to detect customer preferences.
- ❑ Hope Family Wines uses Dimensional Insight to present the information to the executive team and sales reps, which they can then use in presentations to customers.
- ❑ Dimensional Insight provides the right information that help Hope Family Wines tell stories about their product through data.

BACKGROUND

Hope Family Wines has been cultivating vineyards on California's Central Coast for more than 30 years. It consists of six individual brands: Liberty School, Treana, Quest, Austin Hope, Troublemaker, and Austin. The organization is proud of the work it does partnering with more than 50 growers in the region to ensure only the best grapes are being used for its wines.

60 Mall Road
Burlington, MA 01803

t: 781.229.9111
www.dimins.com



QUICK FACTS

Organization: Hope Family Wines

Industry: Wine & Spirits

Location: Paso Robles, California

Revenue: \$9.8 million

Employees: 61

Customer since: 2006

Website: www.hopefamilywines.com

Solution: Diver Platform

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THE CHALLENGE

The beverage alcohol industry is dealing with a shift in consumer preferences. With a wider array of beverages to choose from, customers who in the past might have only bought wine are now spending money on other drinks. A focus on health and wellness is also contributing to different drink choices by consumers, if they choose to drink at all. 'Sober curious' trends, including 'Dry January' and 'Sober October,' are popular, especially with younger consumers.

Younger people who are drinking are trending towards ready-to-drink beverages. For beverage industry organizations, there is a need to look at this information and adjust to remain competitive.





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THE GOAL

Hope Family Wines is working to use data to identify consumer preferences. Part of its work is identifying the proper data points and figuring out what conclusions can be drawn from them. The other part of its work is storytelling, figuring out how to present what it learns about customers and their preferences from the data in order to increase sales.

THE SOLUTION

Hope Family Wines has been a long-time Dimensional Insight customer because the company's platform is easy to use and because the company can get results quickly. The ease of report writing, publication, and analysis gives Hope Family Wines the ability to make informed decisions, telling the story of how customer preferences are impacting its business. Dimensional Insight can also integrate data from different sources, so that Hope Family Wines is using one single source of data truth.

"I'm always grateful to Dimensional Insight because it's always been a great partner of mine," says Jenny Boyd, Director of Sales Analytics for Hope Family Wines. "Everything it creates, I feel like is created for me."



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THE RESULTS

Hope Family Wines uses a variety of reports that unveil consumer preferences, including:

01	Shipments/Depletions: If customers are buying the items that are shipped, it shows that the cycle is working and the right products are being shipped.
02	Forecasts/Actuals: Forecasts can provide an estimate, but the Actuals are giving the company information about what its consumers want.
03	Goals/Incentives/ROI: Ultimately, the ROI is giving the company an indication of whether the product was what consumers wanted.
04	Pricing: What are the buying habits based on – is it a price point? This helps Hope Family Wines understand if its portfolio meets the trends.
05	Syndicated Data: Hope Family Wines uses this data as consumers directly telling the company what it is that they want.
06	Depletion Allowance: This can offer insight into trends about what is being sold, and whether customers came back for re-purchases.
07	DTC: Direct-to-consumer updates helps Hope Family Wines understand who is coming to the product to use it, whether it is at tastings, e-mail campaigns, or where wine is being shipped to.
08	Production: This data provides information such as varietal preference, tasting profile, and price segments.

“You can take the information and look at it to figure out what is important to your customer. What’s important to how you’re going to sell it? What message are you trying to get there?” Boyd says. She takes all of this information from a monthly report and uses Dimensional Insight to present it to the executive team and sales reps. She explains how all of the data applies to individual markets, which then they can explain to their customers.

Hope Family Wines not only knows what it is selling, but it can use the same consumer buying information to understand what its competitors are doing. That allows it to strategize and sell against the competition.



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WHAT'S NEXT

Hope Family Wines is a small, family-owned company, but it is always looking to expand. One way it is looking to do this is by getting its product into more chain stores. The organization continues to use Dimensional Insight to identify its strongest-selling products and figure out how to get those into more chains.

LESSONS LEARNED

"The biggest lesson I can share is you need to make sure you are using the data to tell a story," says Boyd. "Once you've written the report and made it public, you still need to tell the rest of the story. Don't just send a report. Do the deep dive, look at it, understand it. That's part of storytelling, but you have to make sure it's factual. You have to make sure that you can go back and repeat the same information and get the same results every time. So be factual, but use the data in the most compelling, impactful way."





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SEE OUR CUSTOMER RATINGS IN ANALYST RESEARCH

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