



Ideal Customer Profile Discovery Worksheet

Who Loves Your Wine and Why?

Help your winery identify the customers who love you most, buy most often, and are most likely to become loyal wine club members.

Introduction

Your Ideal Customer Profile (ICP) is not just who can buy your wine, it's the people who connect deeply with your brand and return again and again.

Part 1: Identify Your Best Customer

Think about your top 20–50 best customers.

These are customers who:

- Visit more than once
- Join the wine club
- Purchase multiple bottles
- Attend events
- Recommend you to friends

Exercise

List five real customers who represent your best audience.

Customer Name	Where They Live	How They Found You	What They Buy	Wine Club?

Part 2: Demographics (The Basics)

Now identify shared traits among your best customers.

Age Range

- ☐ 25–34
- ☐ 35–44
- ☐ 45–54
- ☐ 55–64
- ☐ 65+

Primary Age Group: _____

Location

Where do most of your best customers live?

- ☐ Local (within 50 miles)
- ☐ Regional tourism
- ☐ Out of state wine travelers
- ☐ Urban centers

Top 3 cities or regions:

- 1.
- 2.
- 3.

Income / Lifestyle

Your best customers likely:

- ☐ Travel frequently
- ☐ Enjoy food & restaurants
- ☐ Attend wine events
- ☐ Collect wine
- ☐ Buy wine as gifts
- ☐ Value artisanal / small producers

Other notes:

Income / Lifestyle

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- ☐ Travel frequently
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Other notes:

Part 3: Buying Behavior

Understanding how they buy is just as important as who they are.

How They Discover You

Rank your top sources of new customers:

- 1.
- 2.
- 3.

Examples:

- Social media
- Regional tourism
- Hotel or restaurant referrals
- Friends / word of mouth
- Wine club referrals
- Events or festivals

Typical Purchase Behavior

Average purchase per visit:

- ☐ 1–2 bottles
- ☐ 3–5 bottles
- ☐ 6+ bottles
- ☐ Case purchases

Do they:

- ☐ Join the club immediately
- ☐ Join after several visits
- ☐ Prefer occasional purchases

Favorite Wines

Which wines attract your best customers?

Wine Style	Strong Sales?
Rosé	☐
Sauvignon Blanc	☐
Chardonnay	☐
Other Whites / Blends	☐
Pinot Noir	☐
Cabernet Sauvignon	☐
Other Red / Blends	☐
Limited Releases	☐

Part 4: Motivation & Emotional Drivers

This is the most important section. Your ideal customers buy because of how your winery makes them feel.

Why Do They Choose Your Winery?

Rank the top motivations.

- ☐ Personal connection with the winemaker
- ☐ Beautiful location
- ☐ Unique wines not found elsewhere
- ☐ Friendly tasting room experience
- ☐ Small production / craft story
- ☐ Discovery / adventure
- ☐ Educational experience

What Do They Value Most?

- ☐ Authenticity
- ☐ Exclusivity
- ☐ Community
- ☐ Learning about wine
- ☐ Luxury experience
- ☐ Relaxation

Write your top 3:

- 1.
- 2.
- 3.

Part 5: Wine Club Alignment

Your ideal customer should naturally align with your wine club.

Ask yourself:

Do your best customers:

- ☐ Like discovering new wines
- ☐ Enjoy seasonal shipments
- ☐ Visit more than once a year
- ☐ Bring friends to the winery
- ☐ Attend member events

If they don't, they may not be your best ICP.

Part 6: Build Your Ideal Customer Profile

Now combine everything you discovered.

Complete the statement below:

Our ideal customer is:

A _____ year old _____ who lives in _____ and enjoys _____.

They discover us through _____ and typically purchase _____.

They love our winery because _____.

They are most likely to join our wine club because _____.

Part 7: Visualize Your Customer

Give your ideal customer a name.

Example:

“Weekend Wine Explorer Wendy”

Describe them:

Age: _____

Occupation: _____.

Travel habits: _____.

Favorite wine: _____.

Why they visit wineries: _____.

Part 8: Strategy Alignment

Now ask:

Are we actively attracting this customer?

Score yourself 1–5.

Category	Score
Website Messaging	
Social Media	
Tasting Room Experience	
Wine Club Design	
Events	