

oregon  
wine



## State of Oregon DTC - Part Two: Winery Performance & Priorities



**Lesley Berglund**

Chairman

WISE Academy

[lesley@wineindustrysaleseducation.com](mailto:lesley@wineindustrysaleseducation.com)



**John Keleher**

Founder

Community Benchmark

[johnk@communitybenchmark.com](mailto:johnk@communitybenchmark.com)



## Agenda

---

1. Overall DTC Breakdown
2. Tasting Room
3. Wine Club
4. Beyond Traditional Channels
5. Key Takeaways

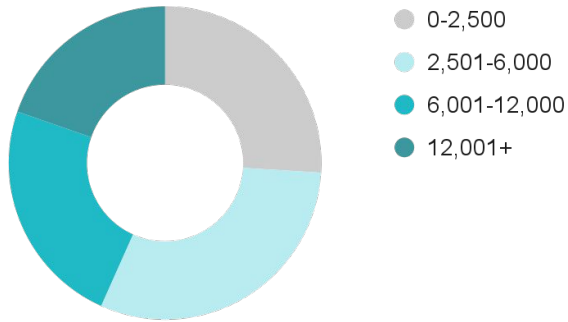
# 1. Overall DTC Breakdown

# Oregon Winery Data Set Description

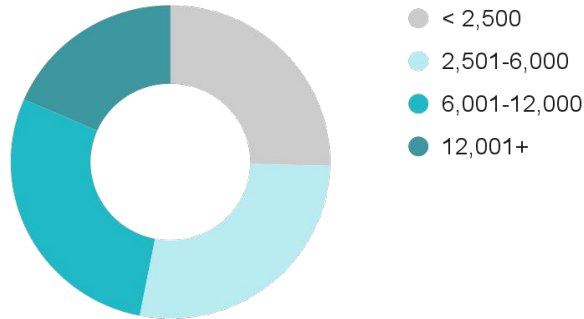
# 63%

Of Oregon DTC Case Production\*

Case Production



Yearly Visitors



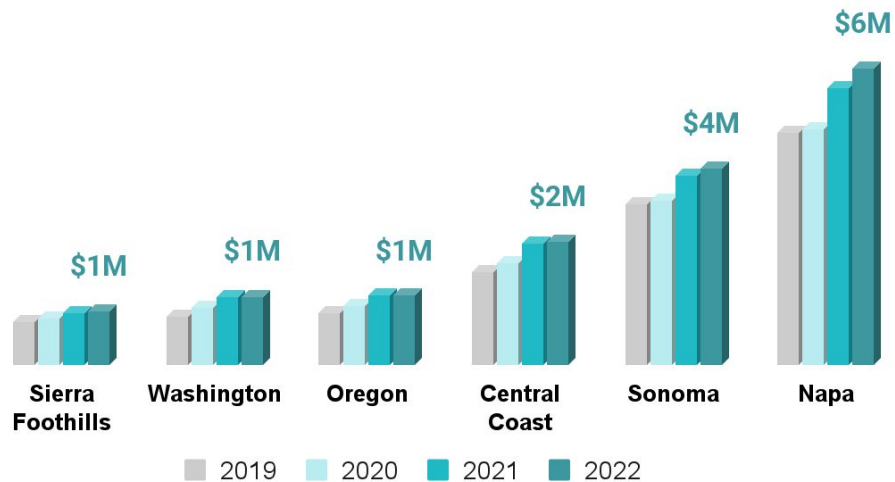
Wine Club Size



# Oregon Strongest (almost) in West Coast DTC Growth Since 2019

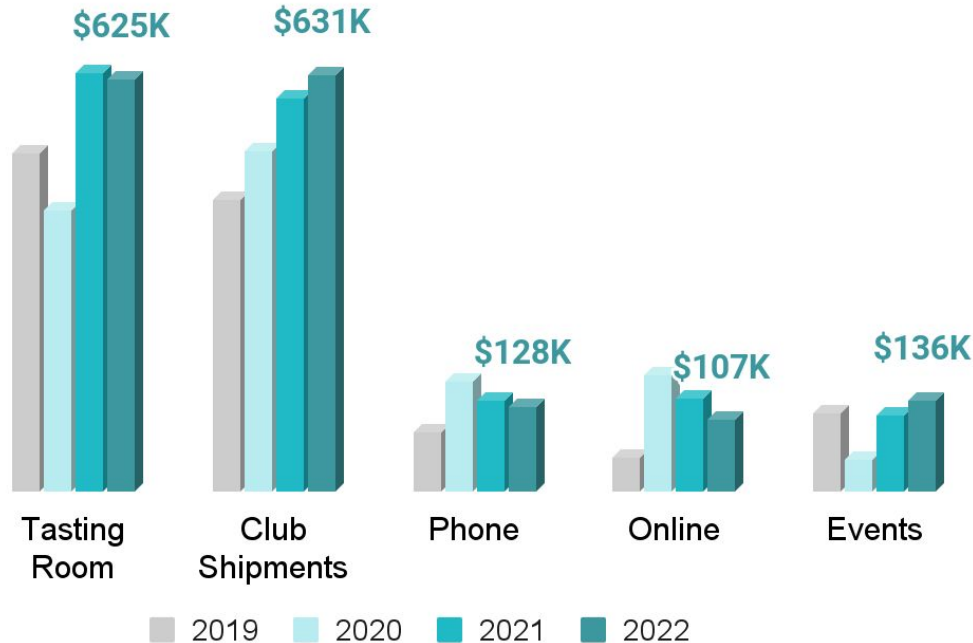


DTC Sales By Region 4 Years



| DTC Sales % Change vs. 2019 (Annualized) |     |
|--|-----|
| Washington                               | 14% |
| Oregon                                   | 12% |
| Central Coast CA                         | 11% |
| Napa                                     | 9%  |
| Sierra Foothills                         | 9%  |
| Sonoma                                   | 7%  |
| All                                      | 9%  |

# Oregon Superior Growth All Channels Except Tasting Room



## YTD DTC % Change vs. 2019\*

|                | OR  | WA&CA |
|----------------|-----|-------|
| Tasting Room   | 7%  | 9%    |
| Club Shipments | 14% | 9%    |
| Phone          | 15% | 2%    |
| Online         | 35% | 15%   |
| Events         | 6%  | -11%  |
| All            | 12% | 9%    |

# Oregon DTC Growth Levels Off In 2022



## DTC Sales By Region 2 Years



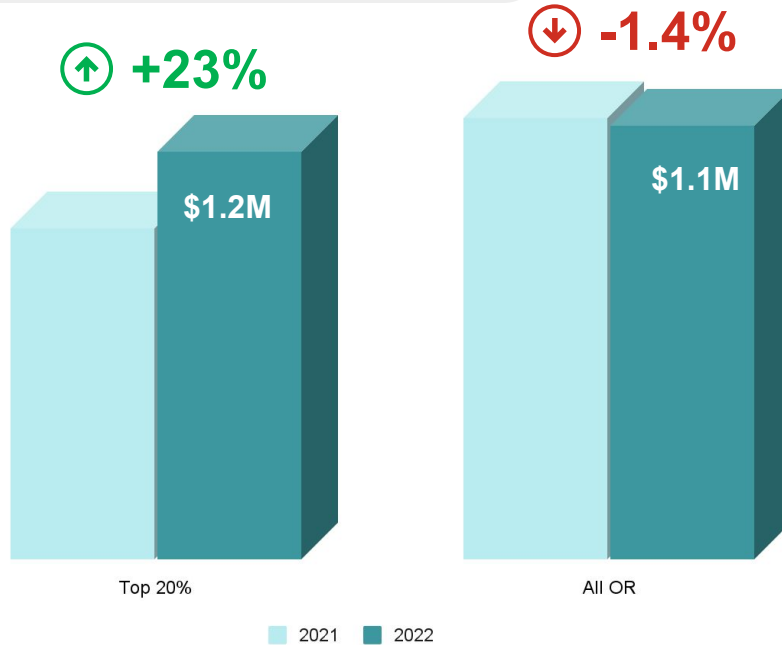
## DTC Sales % Change vs. 2021

|                  |       |
|------------------|-------|
| Napa             | 7.0%  |
| Sonoma           | 3.8%  |
| Sierra Foothills | 3.6%  |
| Central Coast CA | 2.2%  |
| Washington       | 1.9%  |
| Oregon           | -1.4% |
| All              | 2.9%  |

# Top 20% Grow +23%



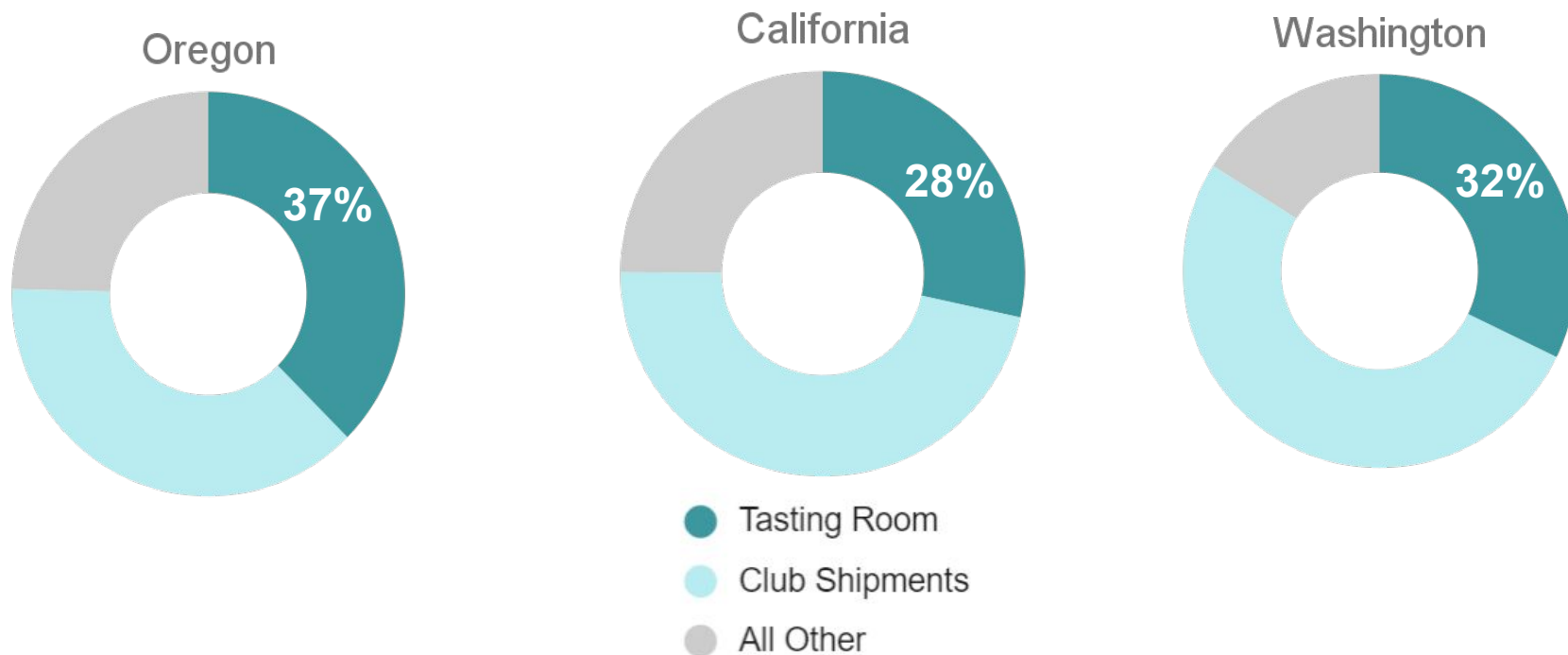
Avg. Total DTC Revenue



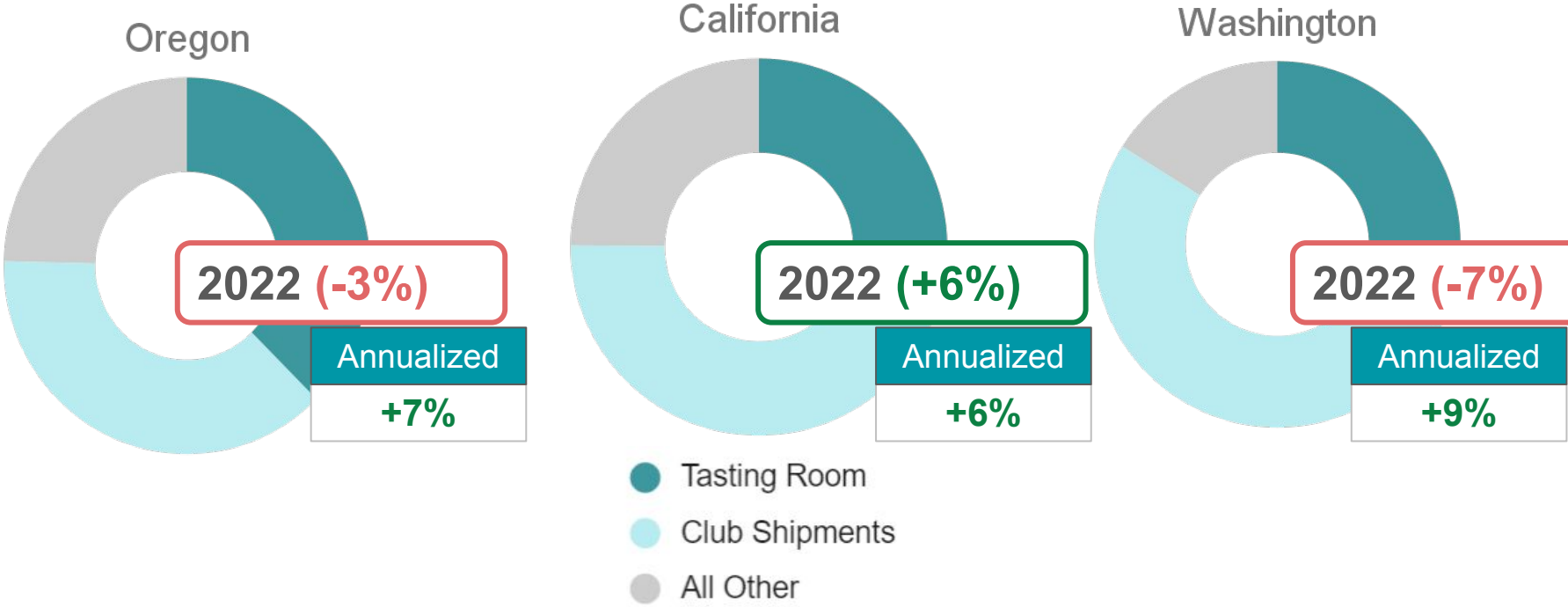
= 2022 vs. 2021

# 2. Tasting Room

# Oregon Tasting Room Emphasis Tops All



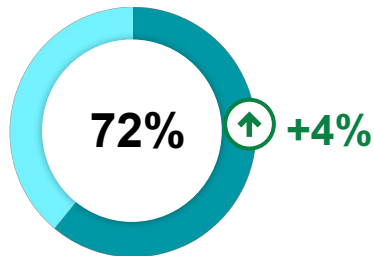
# Oregon Tasting Rooms Cooled Down



# Oregon Tasting Rooms Respond To Visitation Decline



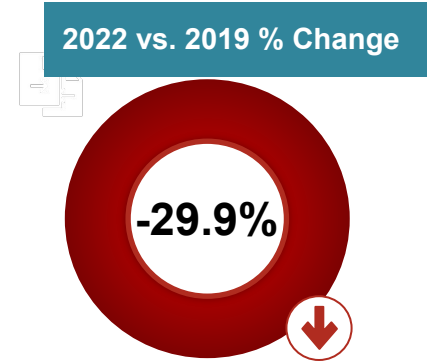
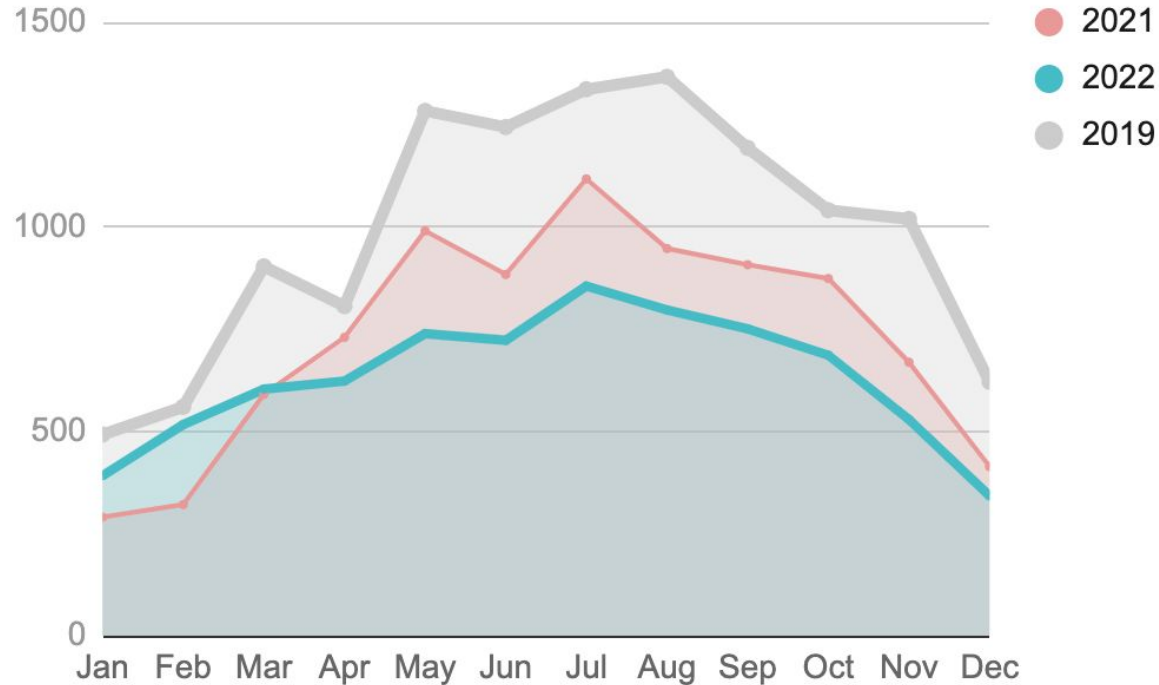
2022



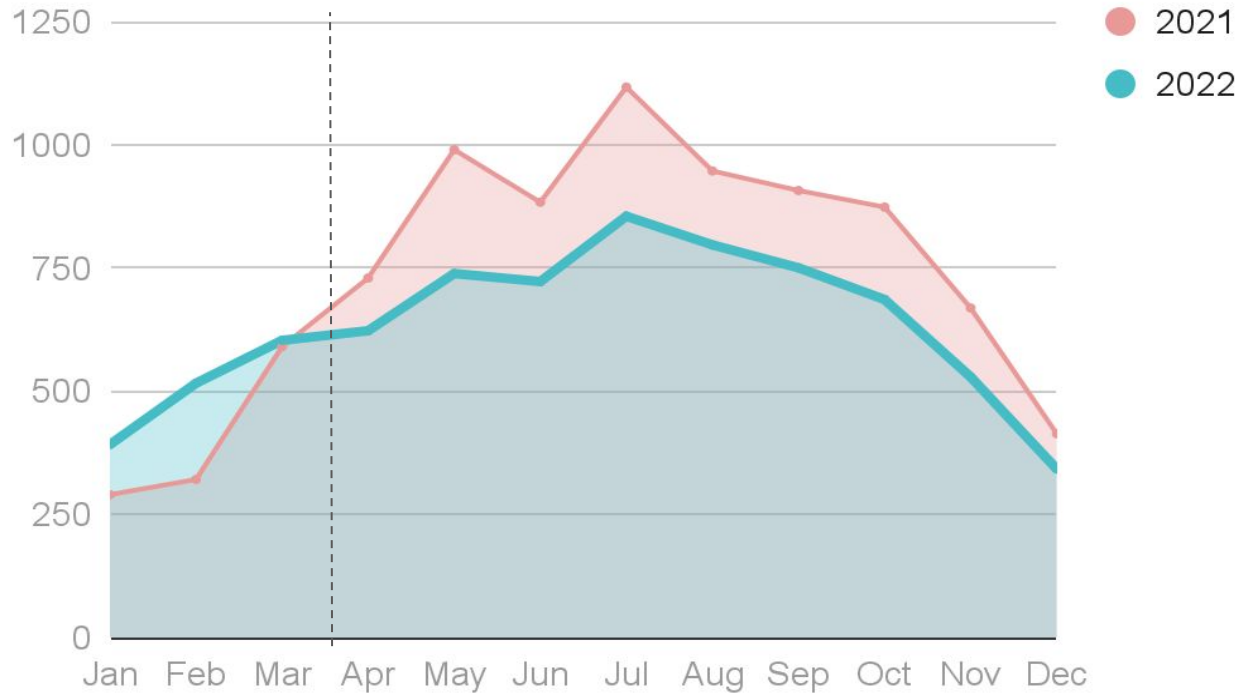
Purchase  
Conversion

Average Sale

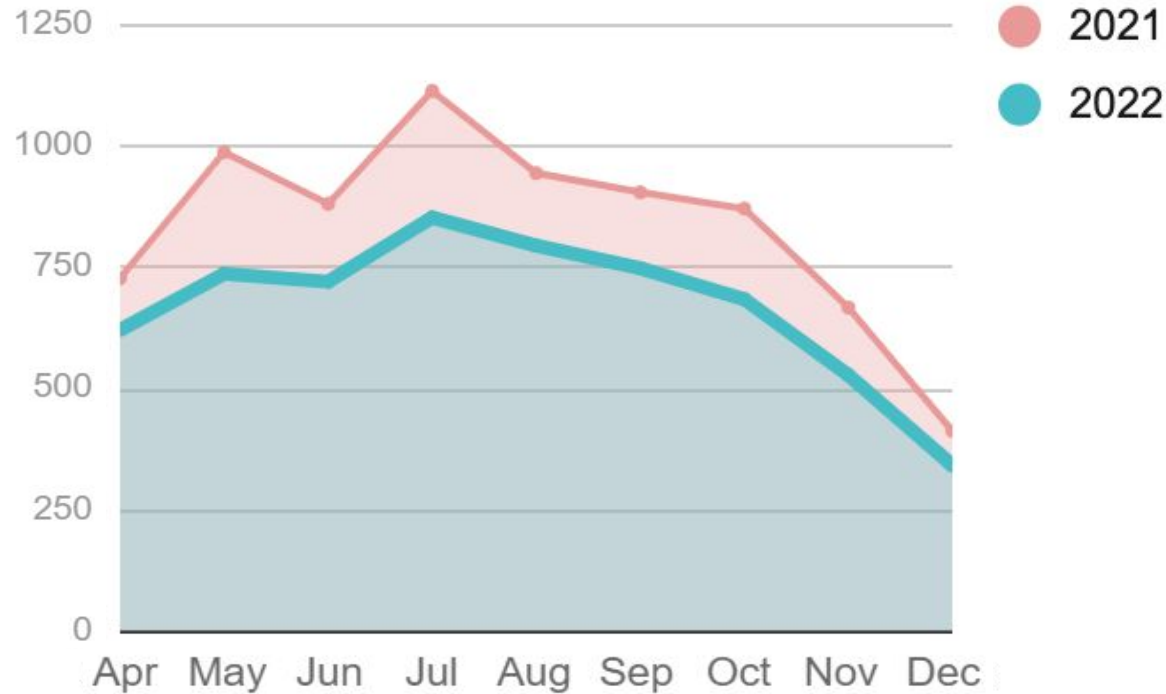
# Oregon 2022 Visitation Down ~30% vs. 2019



# Oregon Visitation Contraction Began In April



# Oregon 2022 Visitation Down 20% Since April



Apr.-Dec. vs 2021

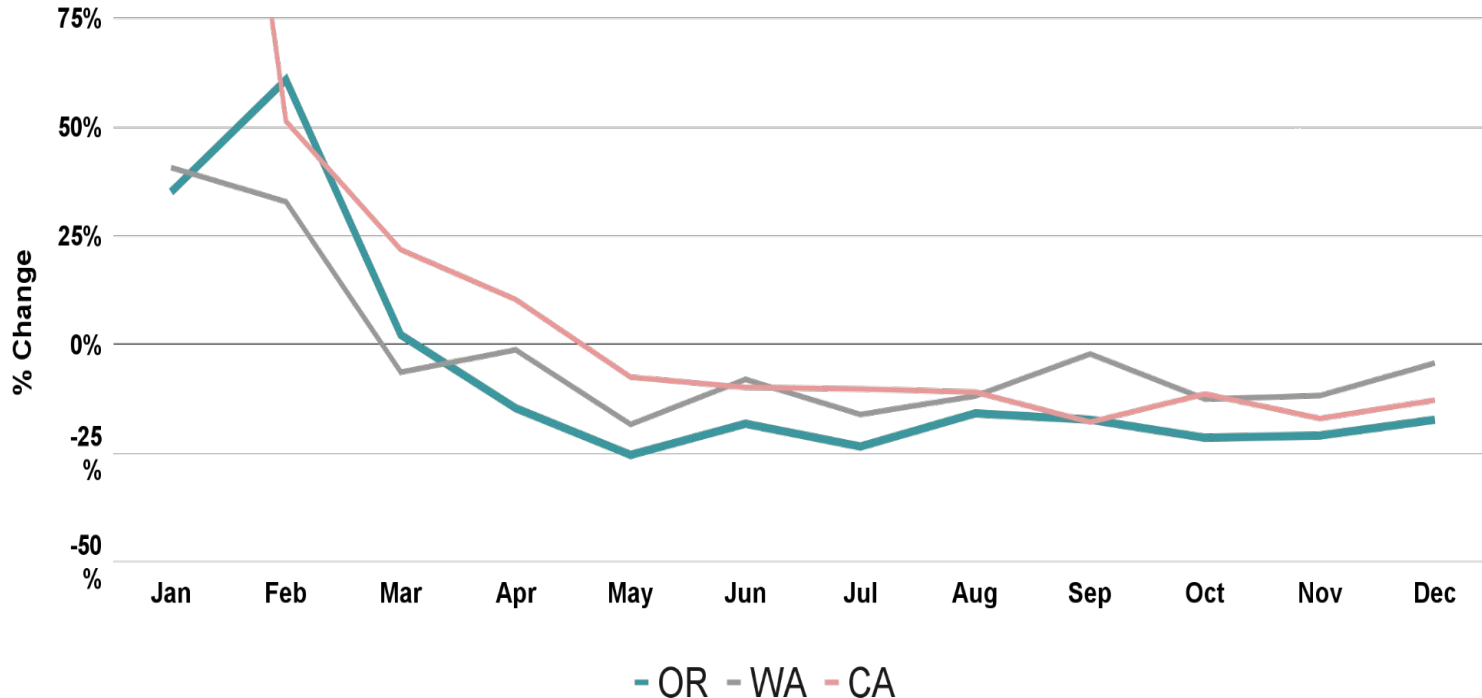
**-20%**



# Similar Visitation Trends For All West Coast



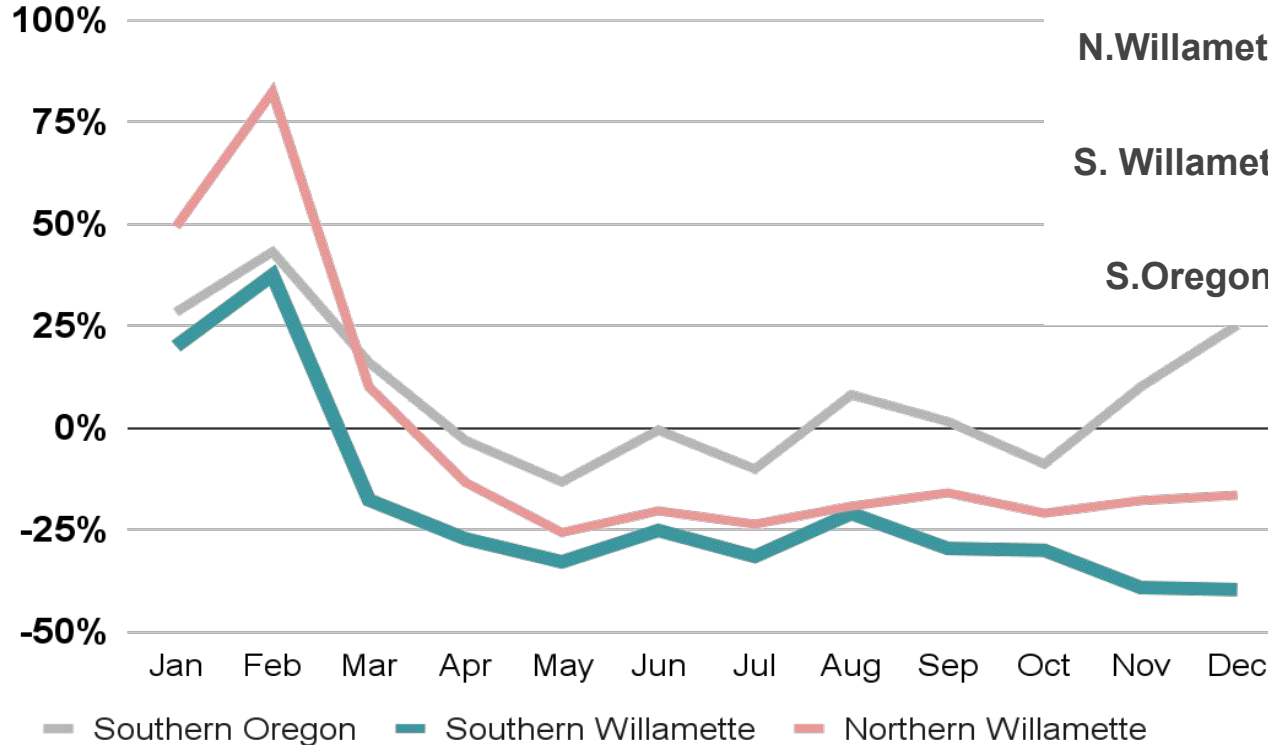
West Coast Visitors by Month, Change vs. 2021



# Southern Oregon Maintains Visitation

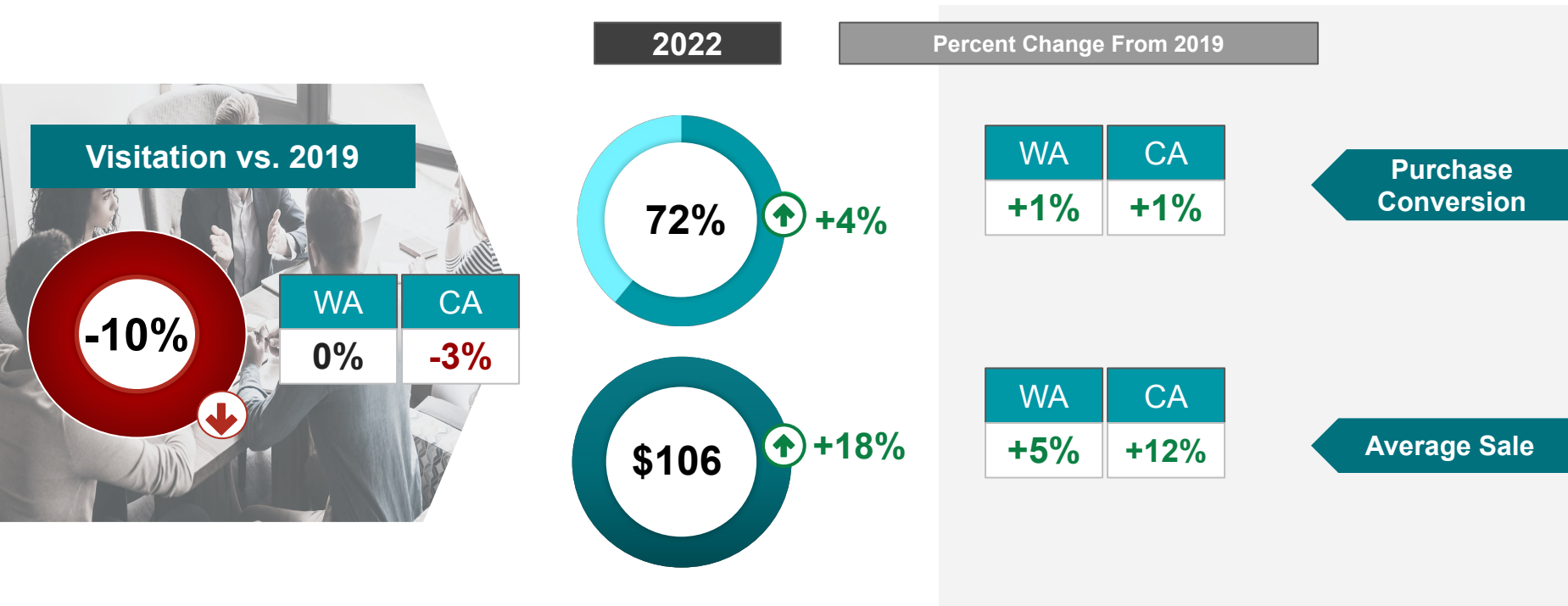


Oregon Visitors by Region By Month vs. 2021



|               | 2022   | Q4 2022 |
|---------------|--------|---------|
| N. Willamette | -12.4% | -19.0%  |
| S. Willamette | -25.0% | -35.4%  |
| S. Oregon     | +3.8%  | +5.9%   |

# Oregon Celebrates Top Visitor Performance Since 2019



## Oregon Tasting Room Average Tasting Room Order By Bottle Price

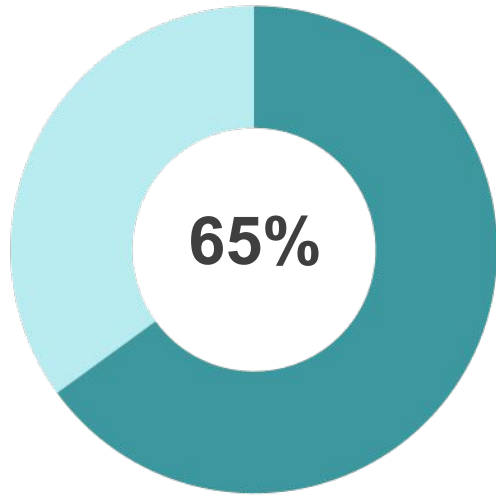
| Avg. Red Bottle Price | Tasting Room AOV | % Change vs. 2021 | Avg. Bottles per Order |
|-----------------------|------------------|-------------------|------------------------|
| \$0-35                | \$62             | <b>(-9%)</b>      | <b>3.5</b>             |
| \$36-50               | \$76             | <b>(+3%)</b>      | <b>1.8</b>             |
| \$51-\$70             | \$123            | <b>(+11%)</b>     | <b>2.1</b>             |
| \$71+                 | \$226            | <b>(+9%)</b>      | <b>2.8</b>             |

# 3. Wine Club

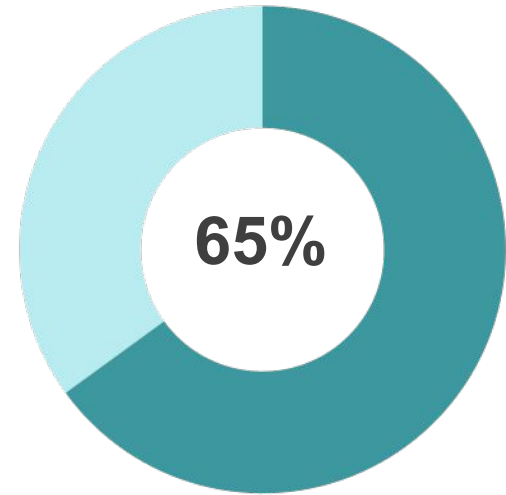
# Total DTC From Club Members

---

Oregon



WA + CA



*\*Note: Club Members are ~32% of Visitors for OR and All*

# Smaller Growth In Total Club Revenues

## OR 2022 vs. 2021 TOTAL CLUB REVENUES



# Smaller Growth In Total Club Revenues

## OR 2022 vs. 2021 TOTAL CLUB REVENUES



Members

899

-2.3%

+1.4%

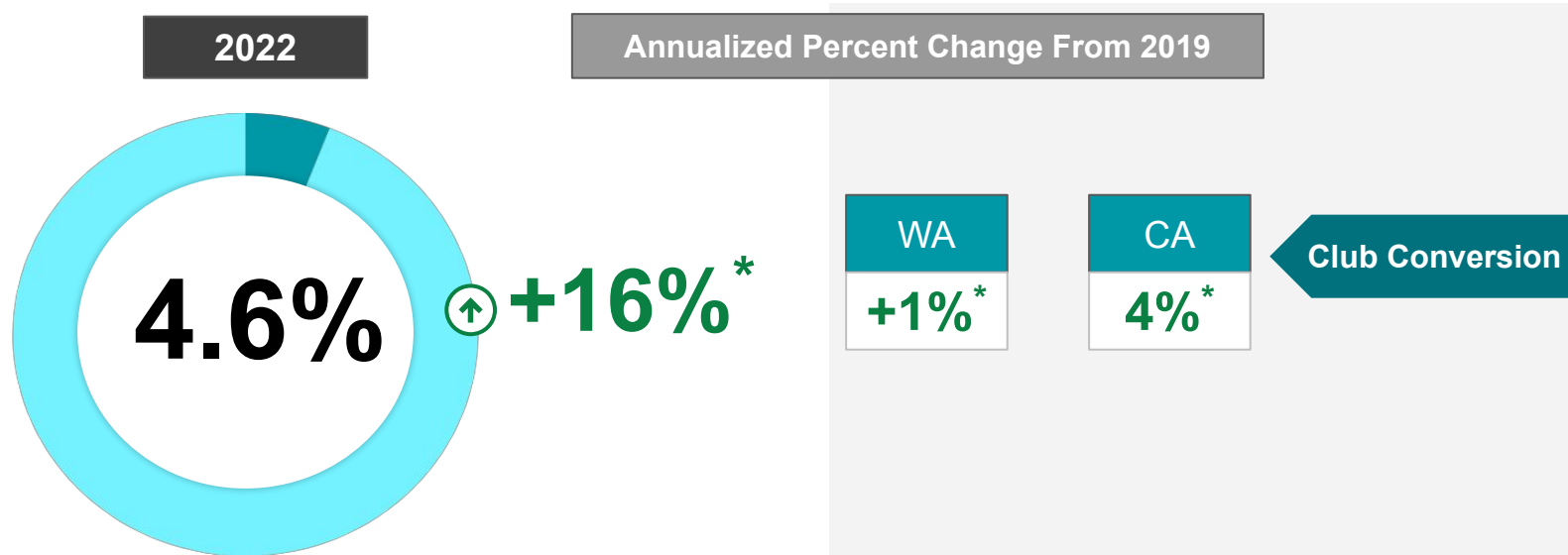
Revenue Per Member

\$886

+4.7%

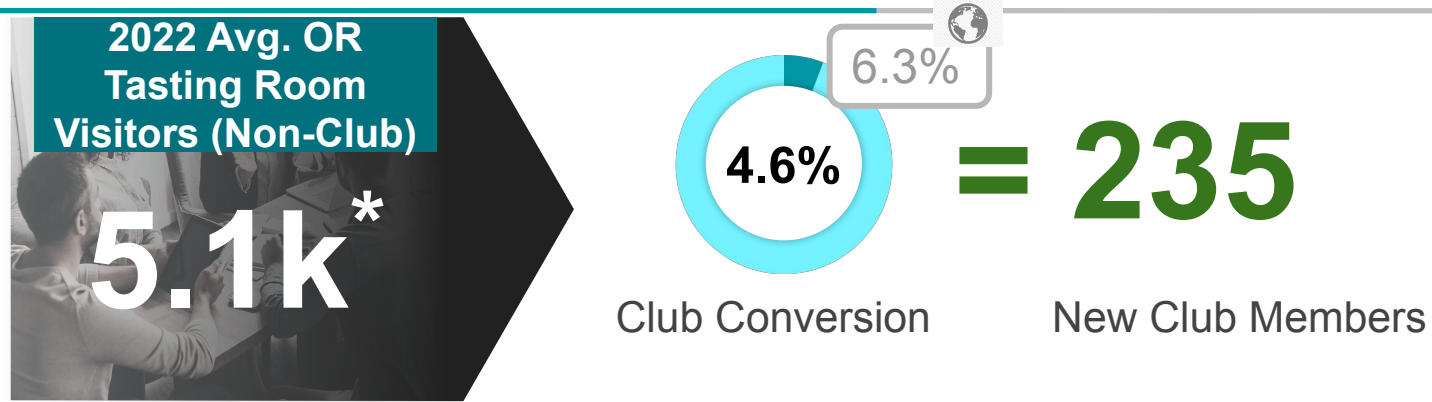
+6.3%

# Oregon Celebrates Most Improved Club Conversions



Oregon Tasting Room Club Conversion Rate

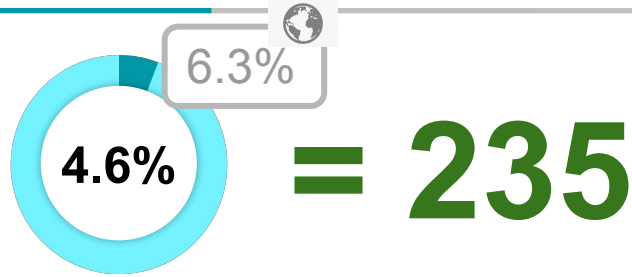
# Oregon Club -2.3% Member Contraction Explained



# Oregon Club -2.3% Member Contraction Explained

2022 Avg. OR  
Tasting Room  
Visitors (Non-Club)

5.1k\*

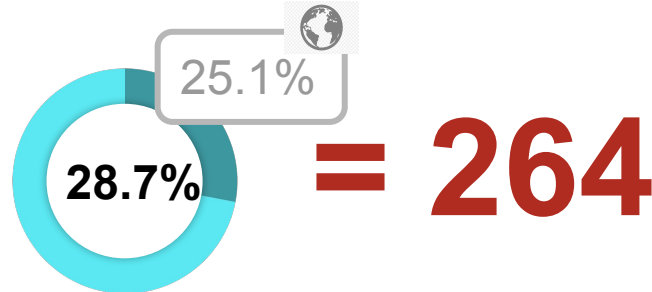


Club Conversion

New Club Members

2022 Avg. OR Winery  
Club Members

920



Attrition Rate

Club Members Lost

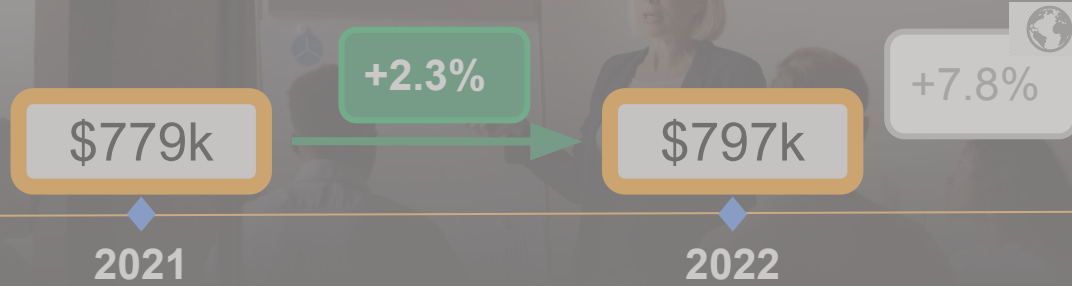
# Oregon Club Conversion & Attrition - Place Your Winery

| 2022 Club Conversion by Annual Visitation |             |             |
|---|-------------|-------------|
|   | OR          | WA+CA       |
| 0-2,500                                   | <b>6.8%</b> | <b>8.1%</b> |
| 2,501-6,000                               | <b>5.6%</b> | <b>6.1%</b> |
| 6,001-12,000                              | <b>4.1%</b> | <b>5.9%</b> |
| 12,001+                                   | <b>4.0%</b> | <b>3.9%</b> |

| 2022 Attrition by Club Size |            |            |
|-----------------------------|------------|------------|
|                             | OR         | WA+CA      |
| 0-300                       | <b>39%</b> | <b>58%</b> |
| 301-600                     | <b>35%</b> | <b>31%</b> |
| 601-1,200                   | <b>27%</b> | <b>29%</b> |
| 1,201+                      | <b>29%</b> | <b>23%</b> |

# Let's Breakdown Revenue Per Member

## OR 2022 vs. 2021 TOTAL CLUB REVENUES



Members

899

-2.3%

+1.4%

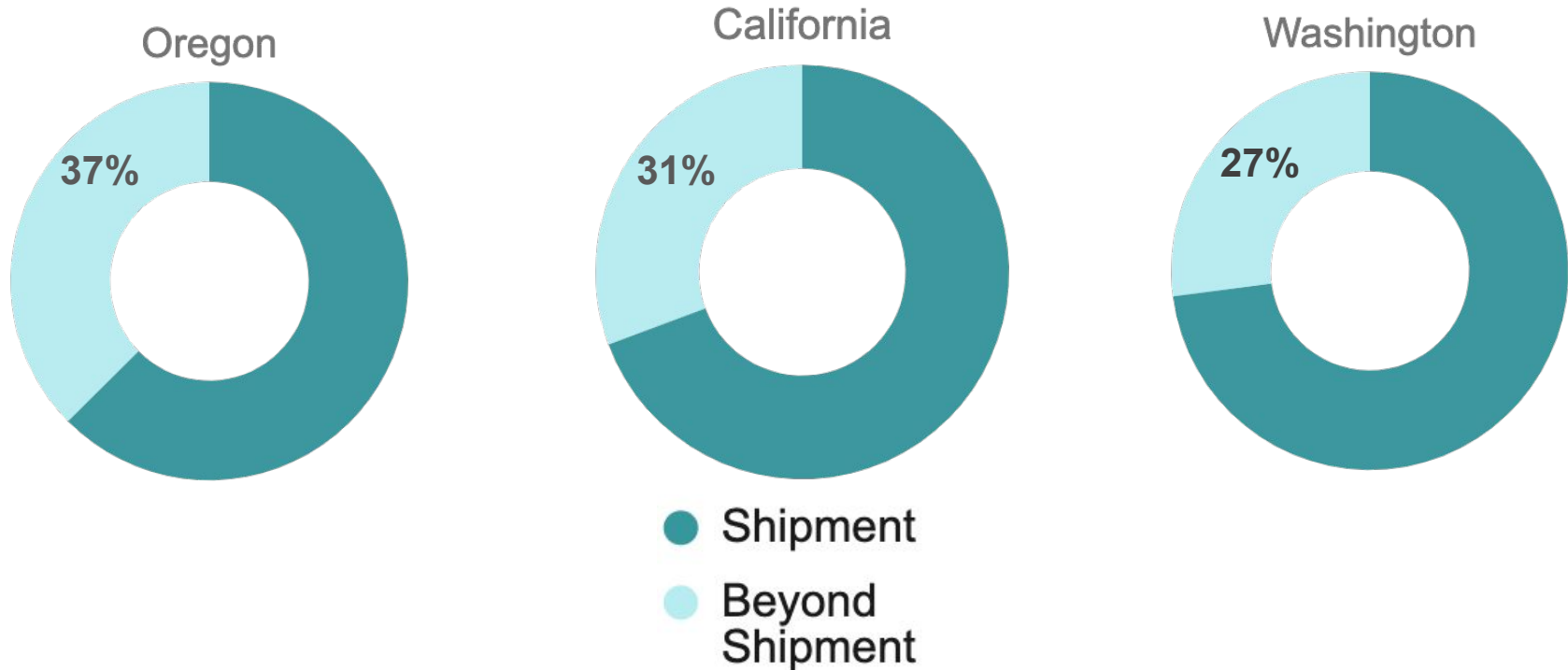
Revenue Per Member

\$886

+4.7%

+6.3%

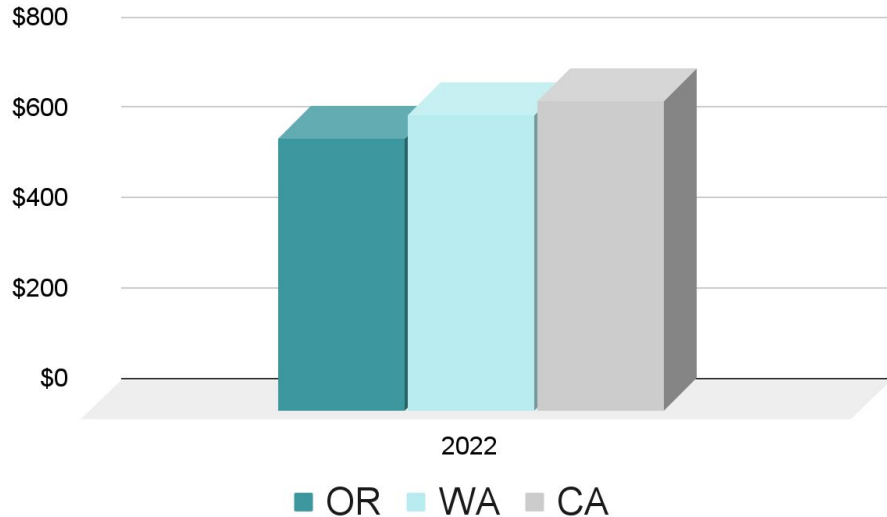
# Oregon Excels In Beyond Shipment Engagement



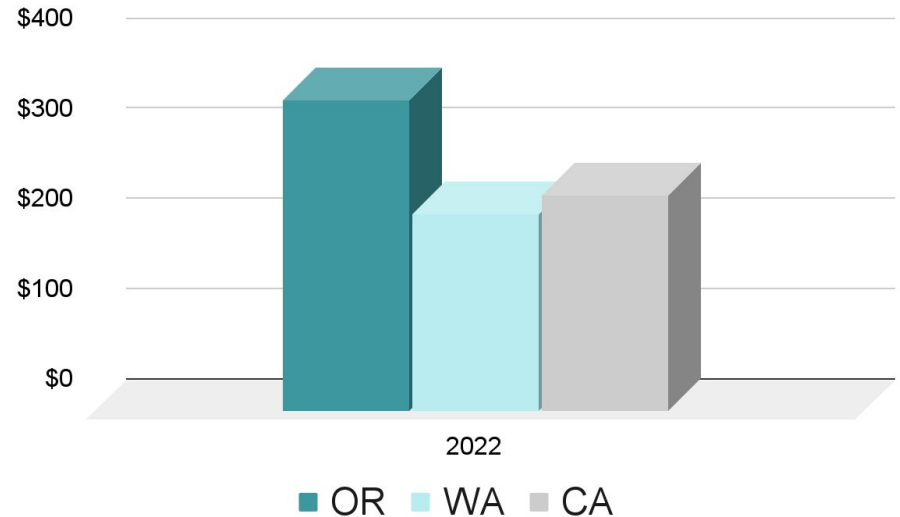
# Oregon Excels In Beyond Shipment Sales Per Member



Shipment Sales per Member



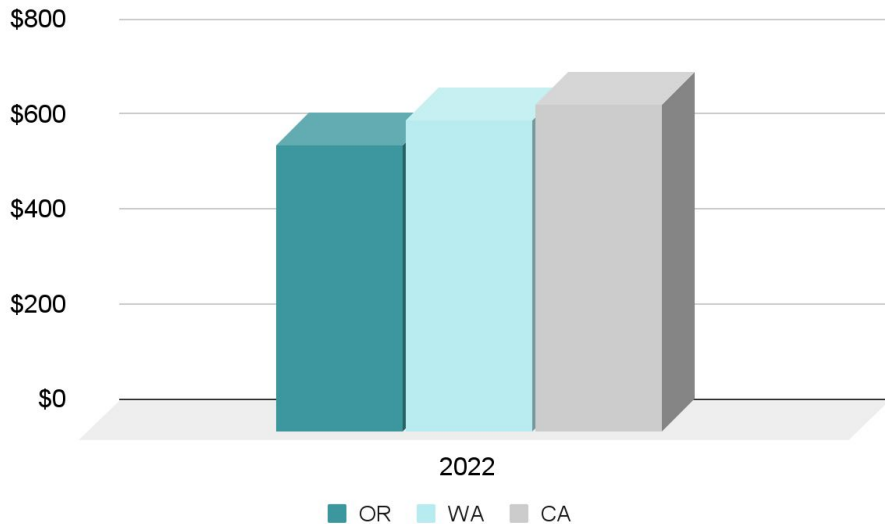
Beyond Shipment Sales per Member



# Is There A Shipment Sales Growth Opportunity?



## Shipment Sales Per Member



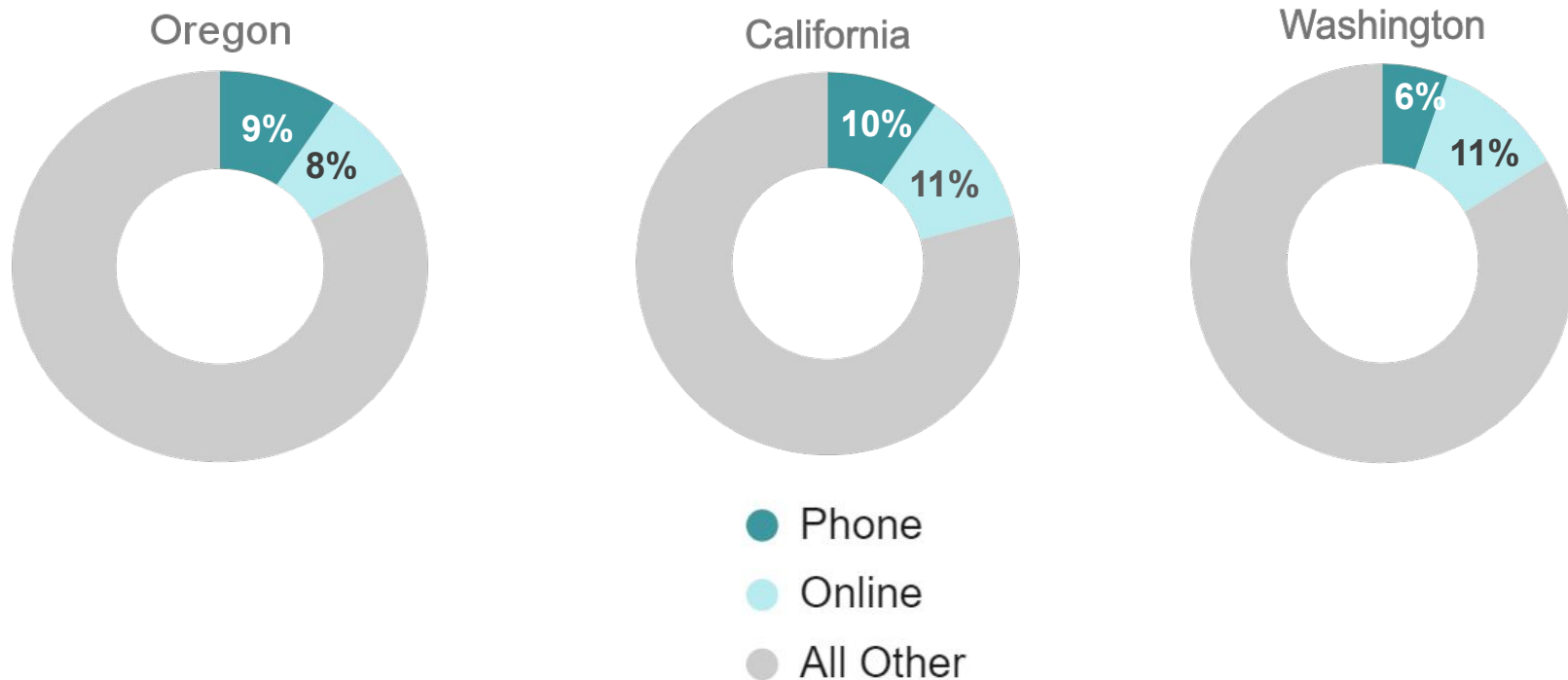
|                      | OR           | WA           | CA           |
|----------------------|--------------|--------------|--------------|
| Shipments Per Member | <b>2.6</b>   | <b>2.3</b>   | <b>3.0</b>   |
| 2022 % chg           | <b>-0.5%</b> | <b>+8.8%</b> | <b>+1.9%</b> |
| Revenue Per Shipment | <b>\$213</b> | <b>\$247</b> | <b>\$233</b> |
| 2022 % chg           | <b>+9.1%</b> | <b>+4.2%</b> | <b>+8.1%</b> |

## Oregon Average Wine Club Order Value (Revenue Per Shipment)

| Avg. Red Bottle Price | Tasting Room AOV | Wine Club AOV |
|-----------------------|------------------|---------------|
| \$0-35                | \$62             | \$121         |
| \$36-50               | \$76             | \$171         |
| \$51-\$70             | \$123            | \$250         |
| \$71+                 | \$226            | \$427         |

# 3. Beyond Traditional Channels

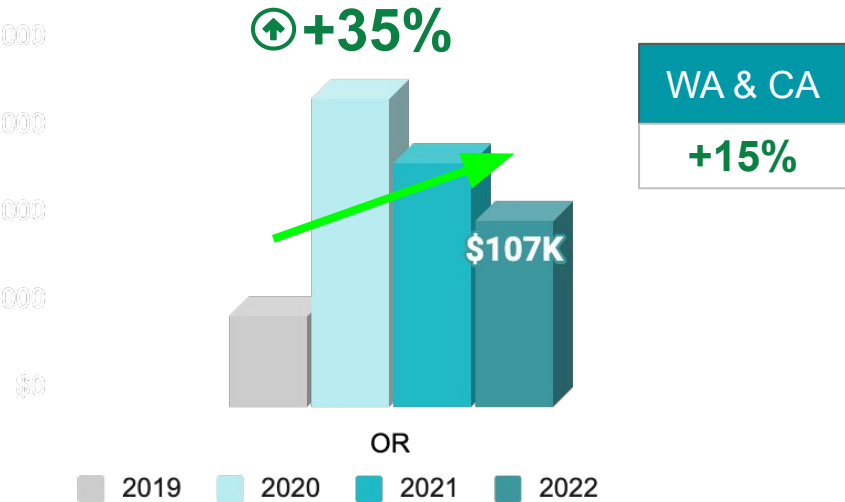
## “Beyond Traditional Channels” Are 17%-21% of DTC Dollars



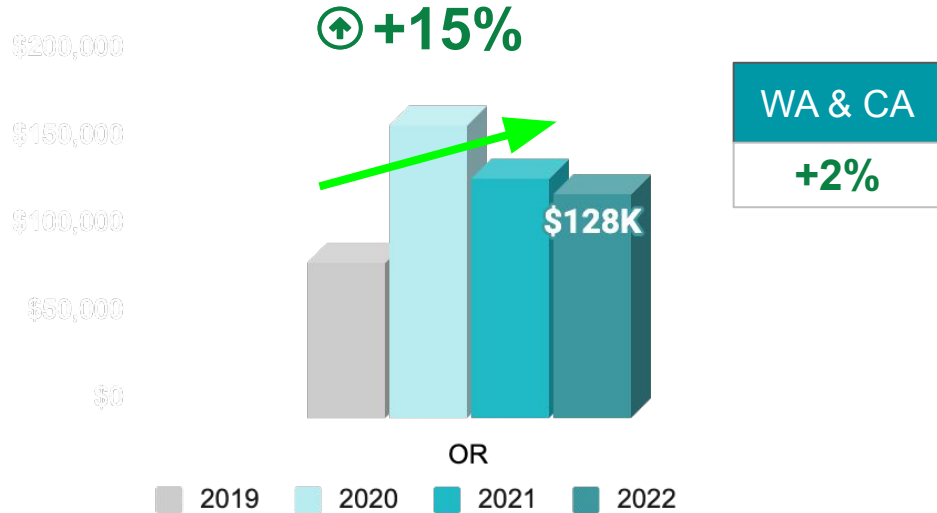
# Oregon Online Sales Champ - Growth Is Volume



Online Sales 4 Years



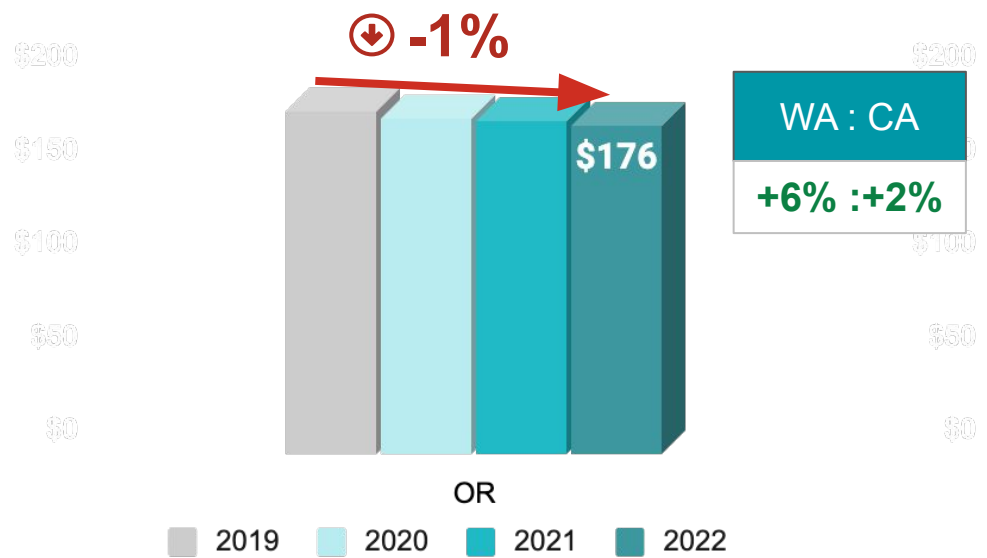
Phone Sales 4 Years



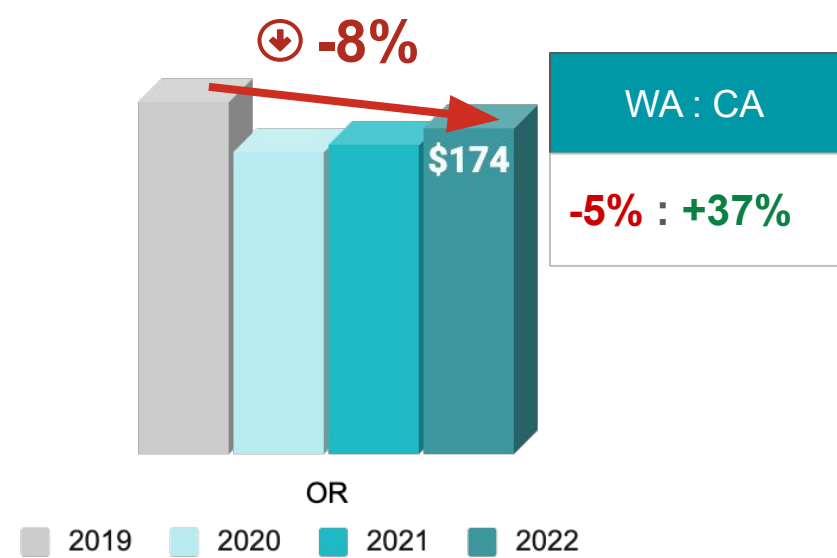
# Oregon Online & Phone Average Order Value Growth\*



## Online AOV 4 Years



## Phone AOV 4 Years



# Oregon Average Order Value by Bottle Price

Segmented  
Benchmarks

| Avg. Red Bottle Price | Tasting Room  | Wine Club     | Online        | Phone         |
|-----------------------|---------------|---------------|---------------|---------------|
| <b>\$0-35</b>         | <b>\$62</b>   | <b>\$121</b>  | <b>\$89</b>   | <b>\$281</b>  |
| % Chg.                | <b>-8.8%</b>  | <b>+7.0%</b>  | <b>-21.7%</b> | <b>+91.0%</b> |
| <b>\$36-50</b>        | <b>\$76</b>   | <b>\$171</b>  | <b>\$140</b>  | <b>\$130</b>  |
| % Chg.                | <b>+3.1%</b>  | <b>+20.7%</b> | <b>-3.1%</b>  | <b>+9.0%</b>  |
| <b>\$51-\$70</b>      | <b>\$123</b>  | <b>\$250</b>  | <b>\$214</b>  | <b>\$202</b>  |
| % Chg                 | <b>+10.9%</b> | <b>+2.6%</b>  | <b>+4.5%</b>  | <b>+22.4%</b> |
| <b>\$71+</b>          | <b>\$226</b>  | <b>\$427</b>  | <b>\$271</b>  | <b>\$280</b>  |
| % Chg                 | <b>+8.8%</b>  | <b>+0.8%</b>  | <b>+10.4%</b> | <b>+25.2%</b> |

# Our Key Oregon Takeaways



## Pride Drivers

1. Overall DTC Growth vs. Pre-COVID
2. Accelerating TR AOV Growth
3. Accelerating \$ / Club Member Continual Growth (Shipment & Beyond)



## Most Improved

1. Club Member Conversion, Low but Improving
2. Digital Growth vs. Pre-COVID



## Key Challenges

1. Total Visitation
2. Decreases in Digital & Phone AOV



## Big Opportunities

1. More, New Visitors
2. More Customer Engagement Across Channels

# AOV by Price Segment

| Avg. Red Bottle Price | Tasting Room      | TR Bottles per Order | Wine Club         | WC Bottles per Order | Online            | Online Bottles per Order | Phone             | Phone Bottles per Order |
|-----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|--------------------------|-------------------|-------------------------|
| \$0-35                | \$62<br>(-8.8%)   | 2.5                  | \$121<br>(+7.0%)  | 4.8                  | \$89<br>(-21.7%)  | 3.5                      | \$281<br>(+91.0%) | 11.2                    |
| \$36-50               | \$76<br>(+3.1%)   | 1.8                  | \$171<br>(+20.7%) | 4.0                  | \$140<br>(-3.1%)  | 3.2                      | \$130<br>(+9.0%)  | 3.0                     |
| \$51-\$70             | \$123<br>(+10.9%) | 2.1                  | \$250<br>(+2.6%)  | 4.1                  | \$214<br>(+4.5%)  | 3.5                      | \$202<br>(-22.4%) | 4.7                     |
| \$71+                 | \$226<br>(+8.8%)  | 2.8                  | \$427<br>(+0.8%)  | 5.3                  | \$271<br>(+10.4%) | 3.4                      | \$280<br>(+25.2%) | 3.5                     |

# AOV by Price Segment

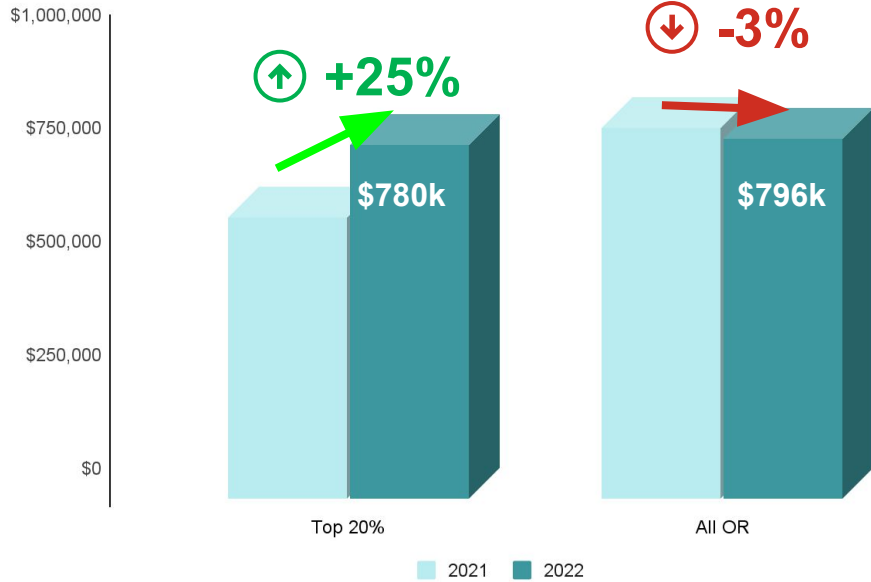
| Avg. Red Bottle Price | Tasting Room | TR Bottles per Order | Wine Club | WC Bottles per Order | Online | Online Bottles per Order | Phone | Phone Bottles per Order |
|-----------------------|--------------|----------------------|-----------|----------------------|--------|--------------------------|-------|-------------------------|
| \$0-35                | \$62         | 2.5                  | \$121     | 4.8                  | \$89   | 3.5                      | \$281 | 11.2                    |
| \$36-50               | \$76         | 1.8                  | \$171     | 4.0                  | \$140  | 3.2                      | \$130 | 3.0                     |
| \$51-\$70             | \$123        | 2.1                  | \$250     | 4.1                  | \$214  | 3.5                      | \$202 | 4.7                     |
| \$71+                 | \$226        | 2.8                  | \$427     | 5.3                  | \$271  | 3.4                      | \$280 | 3.5                     |

# 4. Top 20% DTC Performers

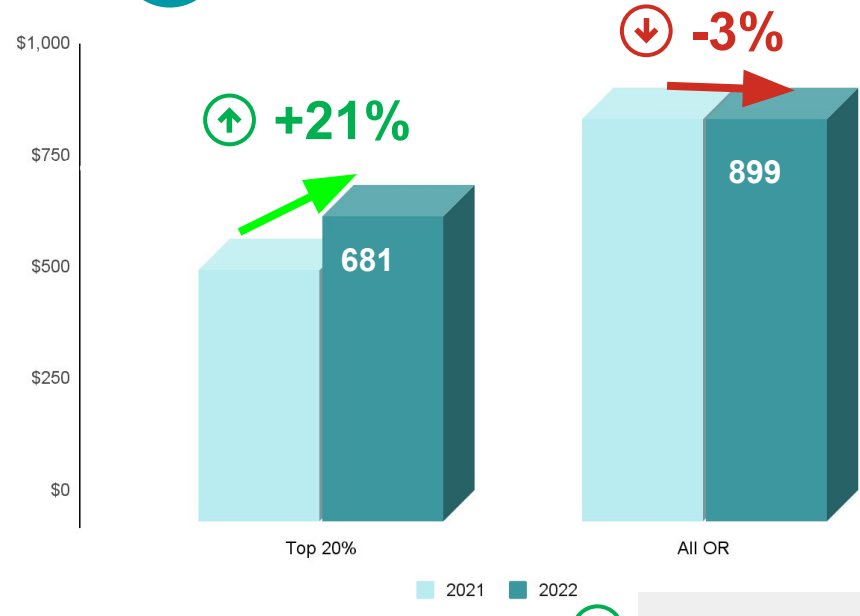
# Top 20% Club Growth



## Member Revenue



## Active Members

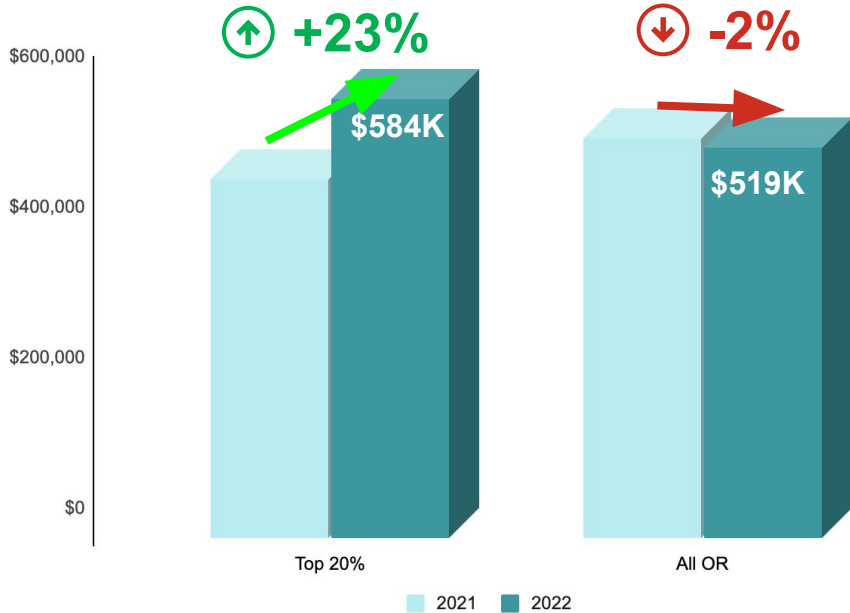


= 2022 vs. 2021

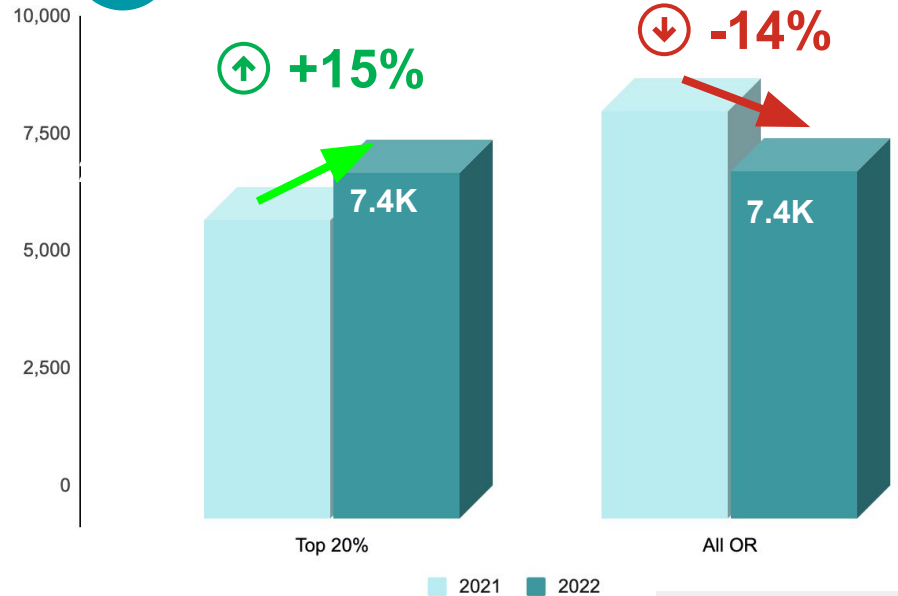
# Top 20% Tasting Room Growth



## Tasting Room Revenue



## Visitors



= 2022 vs. 2021

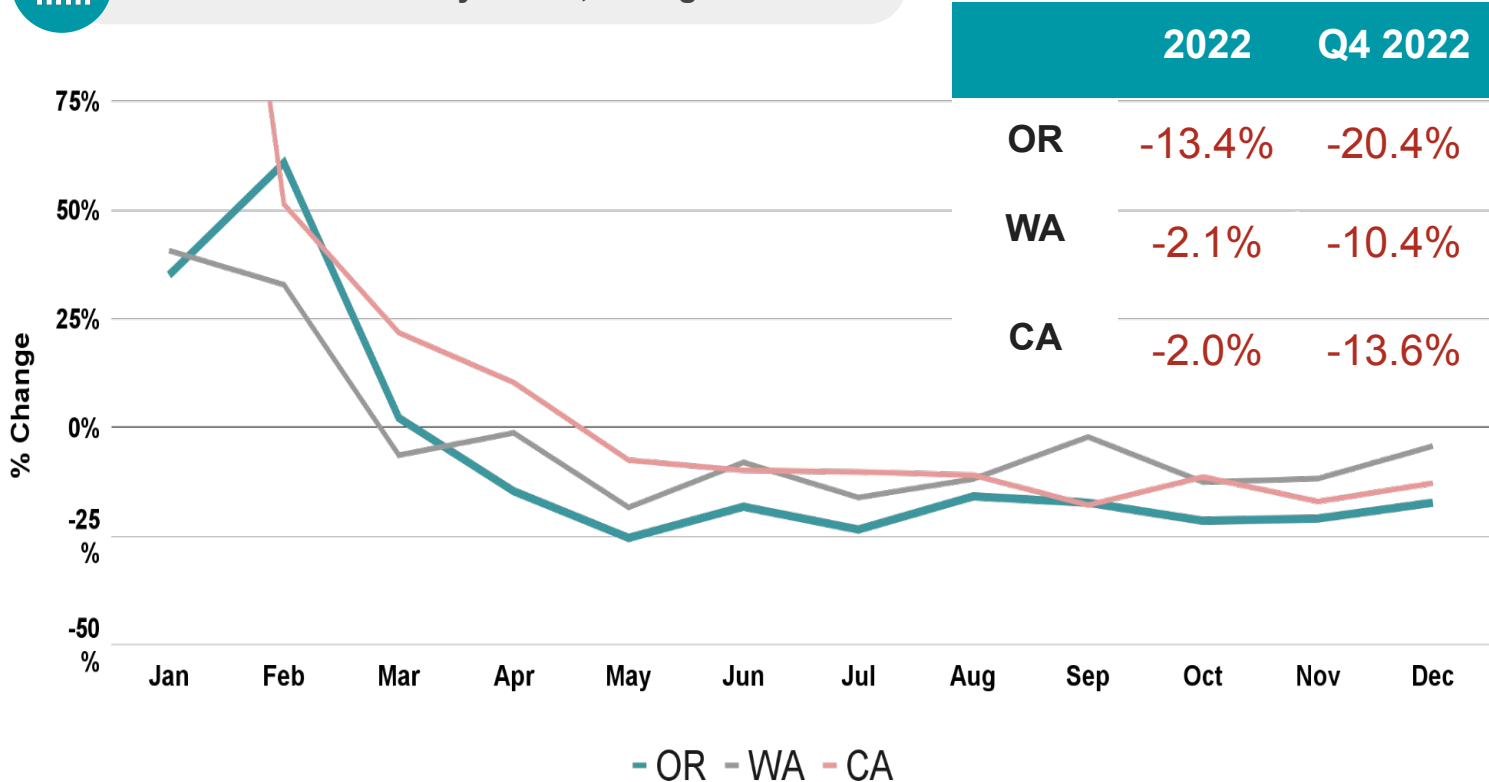
# Top 20%: Similarities

| Tasting Room Details    |             |             |
|-------------------------|-------------|-------------|
|                         | Top 20%     | All         |
| Tasting Fee             | <b>\$28</b> | <b>\$28</b> |
| Avg. Red Bottle Price   | <b>\$53</b> | <b>\$49</b> |
| Avg. White Bottle Price | <b>\$41</b> | <b>\$36</b> |
| % Club Visitors         | <b>31%</b>  | <b>30%</b>  |

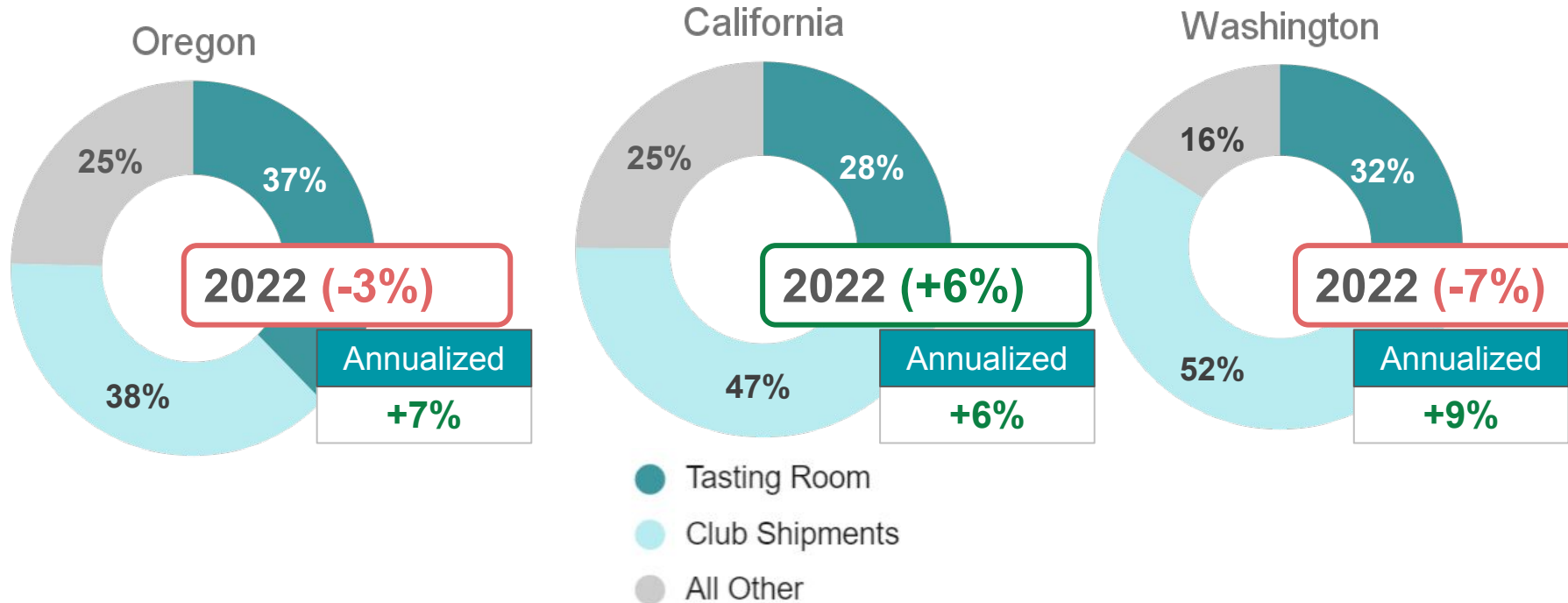
# Similar Visitation Trends For All West Coast



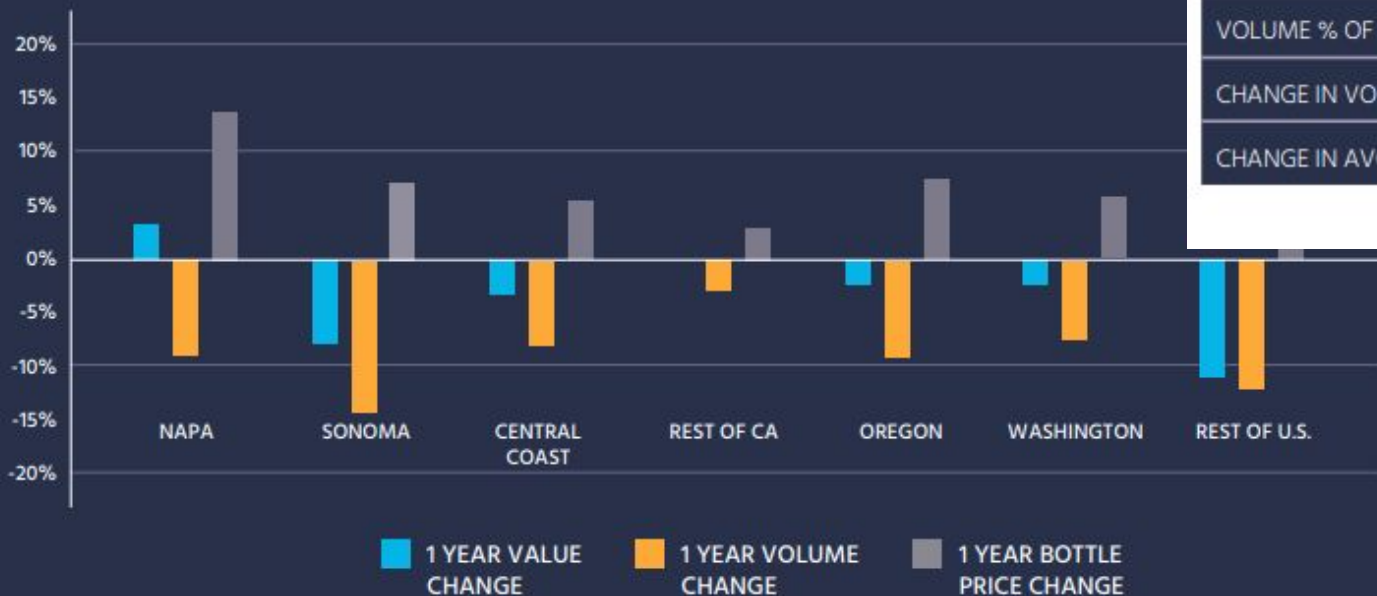
West Coast Visitors by Month, Change vs. 2021



# Oregon Tasting Room Emphasis Tops All



### CHANGE IN VOLUME, VALUE AND PRICE BY REGION

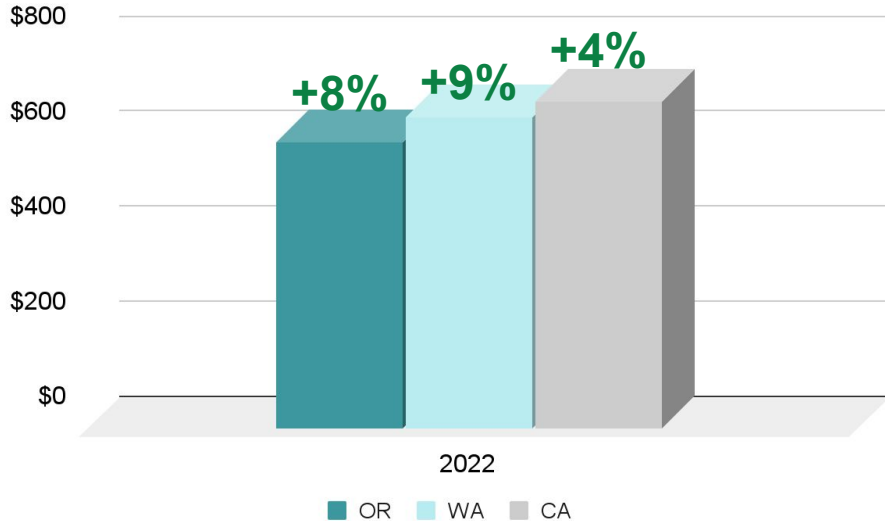


|                                 |               |
|---------------------------------|---------------|
| TOTAL VALUE                     | \$278,510,673 |
| TOTAL VOLUME IN CASES           | 508,727       |
| AVG. PRICE PER BOTTLE           | \$45.62       |
| VALUE % OF TOTAL                | 6.7%          |
| CHANGE IN VALUE                 | -2.5%         |
| VOLUME % OF TOTAL               | 6.7%          |
| CHANGE IN VOLUME                | -9.3%         |
| CHANGE IN AVG. PRICE PER BOTTLE | 7.5%          |

# An Opportunity To Keep Growing Club Average Order Value?



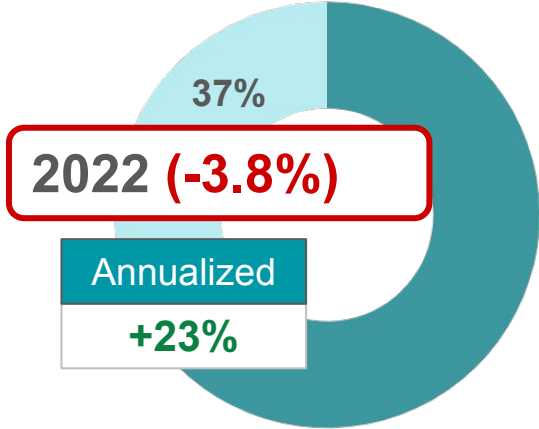
OR Shipment Sales per Member Growth\* vs. 2019



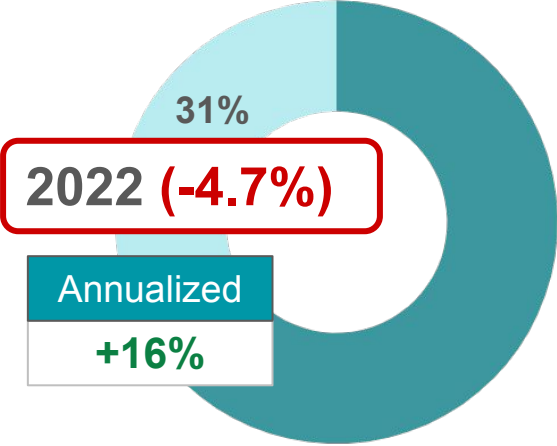
|                      | OR    | WA    | CA    |
|----------------------|-------|-------|-------|
| Shipments Per Member | 2.6   | 2.3   | 3.0   |
| 2022 % chg           | -0.5% | +8.8% | +1.9% |
| Revenue Per Shipment | \$213 | \$247 | \$233 |
| 2022 % chg           | +9.1% | +4.2% | +8.1% |

# Oregon Excels In Beyond Shipment Engagement

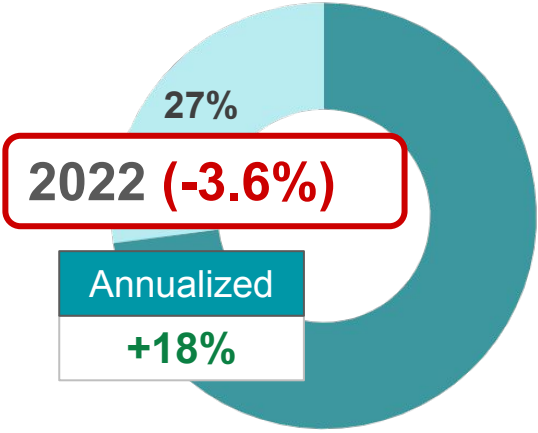
Oregon



California



Washington

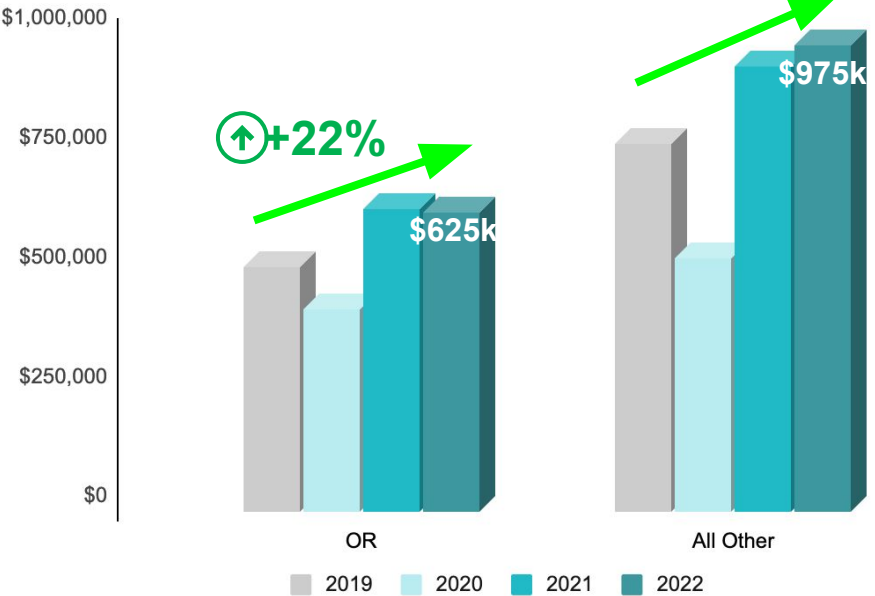


- Shipment
- Beyond Shipment

# Oregon Growth Levels Off



Tasting Room Sales 4 Years

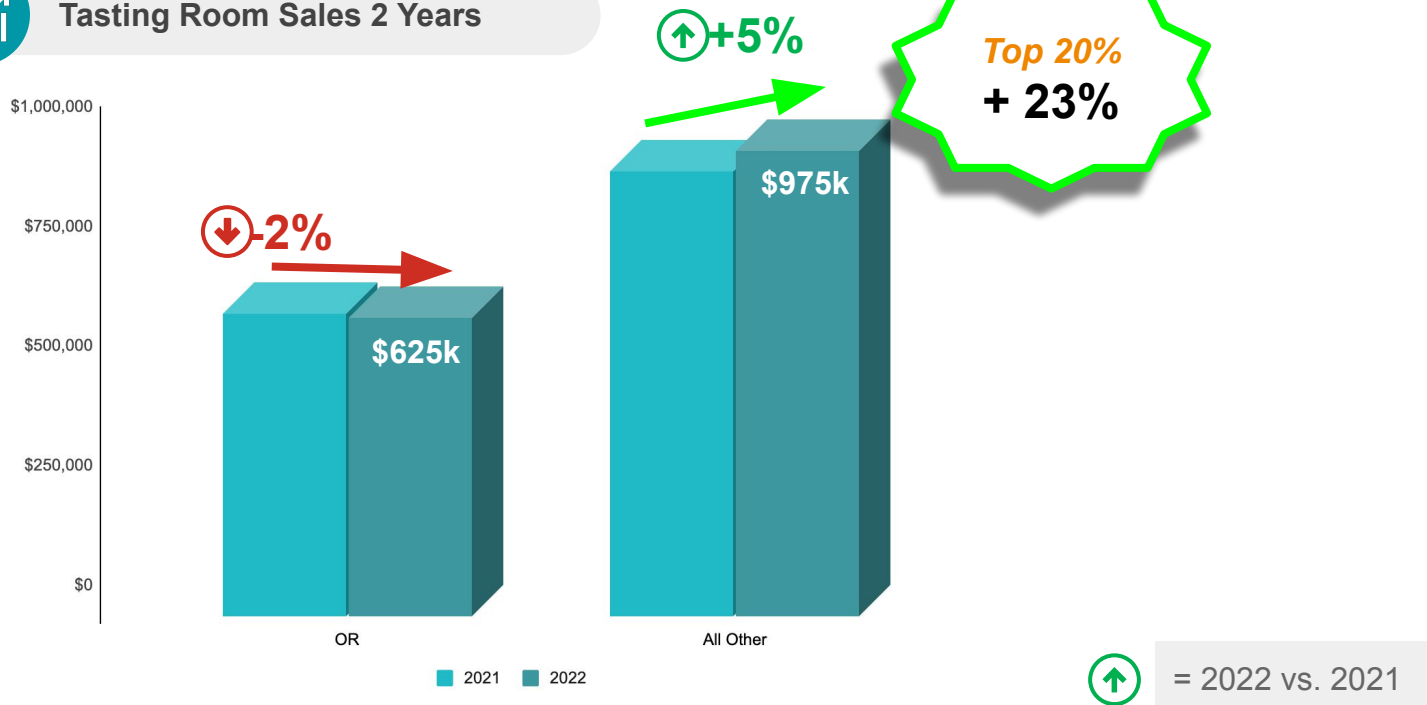


= 2022 vs. 2019

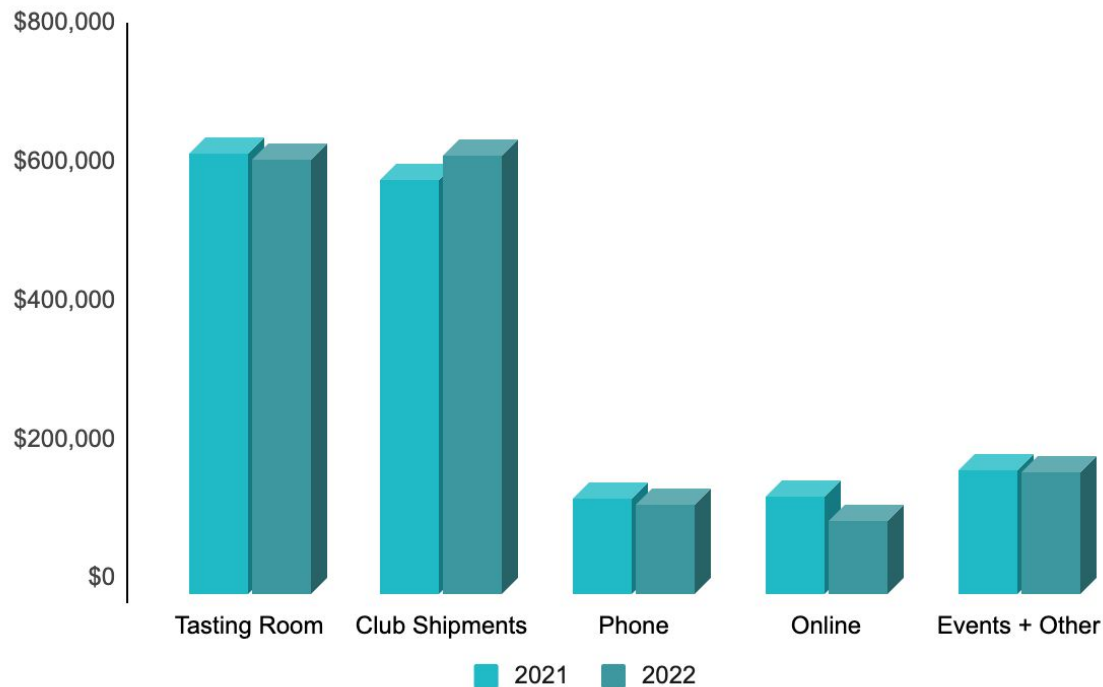
# Oregon Growth Levels Off



## Tasting Room Sales 2 Years



# Oregon DTC Sales By Channel



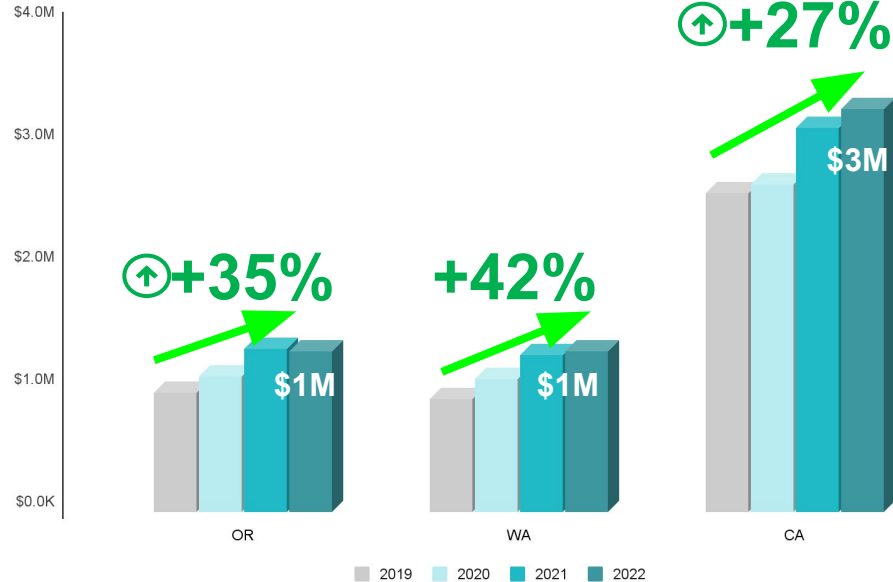
## YTD DTC Sales % Change vs. 2021

|                | OR   | All  |
|----------------|------|------|
| Tasting Room   | -2%  | 3%   |
| Club Shipments | 6%   | 11%  |
| Phone          | -7%  | -13% |
| Online         | -24% | -13% |
| Events+Other   | -1%  | 13%  |

# Oregon Growth Levels, But Still Overall Greater



## Total DTC Sales 4 Years

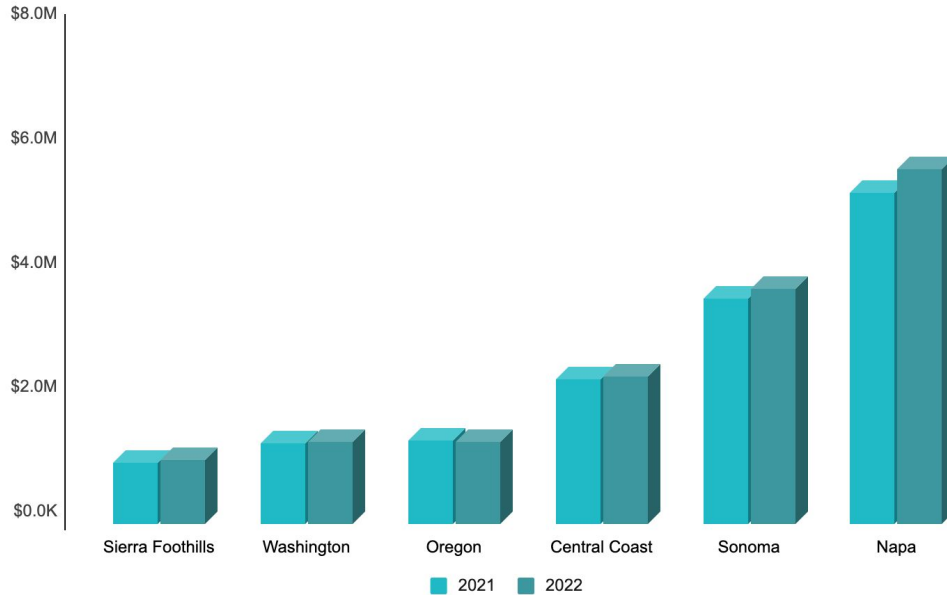


= 2022 vs. 2019

# Oregon Levels DTC Growth Since 2021



DTC Sales By Region 2 Years



DTC Sales % Change vs. 2021

|                  |     |
|------------------|-----|
| Washington       | 1%  |
| Oregon           | -2% |
| Central Coast    | 2%  |
| Napa             | 7%  |
| Sierra Foothills | 2%  |
| Sonoma           | 5%  |
| All Total        | 4%  |
| All (except OR)  | 5%  |

# West Coast Club Revenue

## West Coast 2022 vs. 2021 TOTAL CLUB SALES

\$1.76M

2021

+7.1%

\$1.80M

2022

Members

1,859

+0.8%

Revenue Per Member

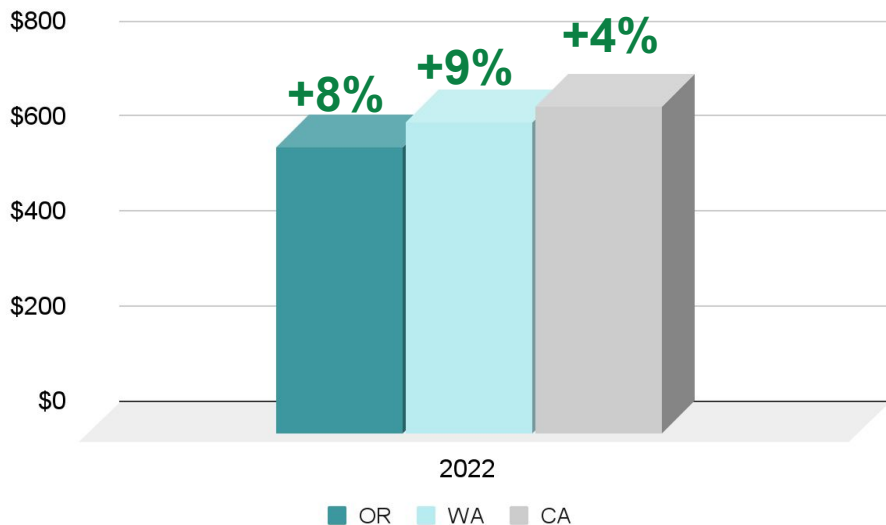
\$967

+6.3%

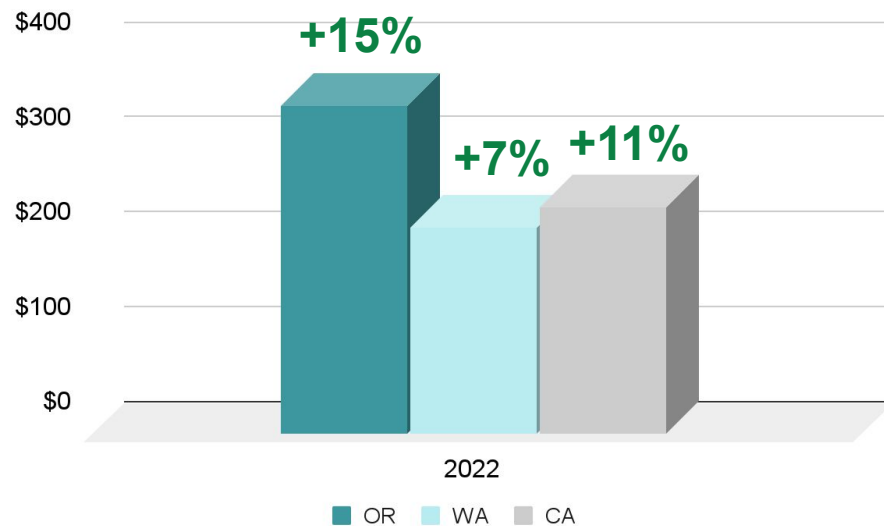
# Oregon Revenue Per Member Growth\* vs. 2019 Breakdown



## Shipment Sales per Member



## Beyond Shipment Sales per Member



# Club Comps

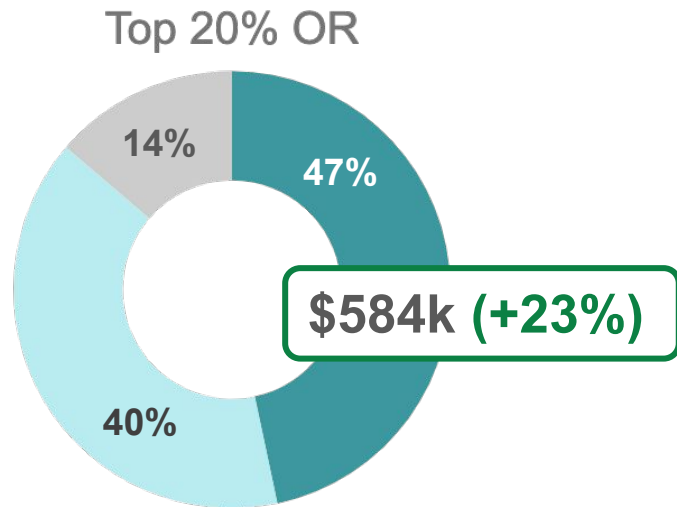
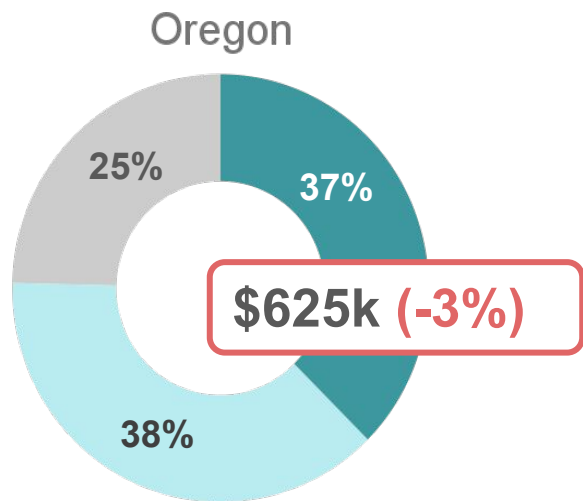
|                | OR            | WA            | CA             |
|----------------|---------------|---------------|----------------|
| Total Club     | \$796 (+2.3%) | \$865(+8.6%)  | \$2.4 (+7.7%)  |
| Shipment       | 63% (+6%)     | 73% (+14.5%)  | 69% (+11.6%)   |
| Beyond         | 37% (-4.1%)   | 27%(-4.6%)    | 31% (-0.9%)    |
| Members        | 899 (-2.5%)   | 1110 (+1.0%)  | 2430 (+1.4%)   |
| Rev/Member     | \$886 (+4.9%) | \$779 (+7.6%) | \$1002 (+6.3%) |
| Ships          | 2.6 (-0.5%)   | 2.3(+8.8%)    | 3.0 (+1.9%)    |
| Rev/Ship       | \$213 (+9.1%) | \$247(+4.2%)  | \$233 (+8.1%)  |
| Attrition      | 28%           | 26%           | 25%            |
| Club Visitor % | 32% (+10.5%)  | 33% (+12%)    | 32% (+3.7%)    |

OR we didn't grow our club as much bc of visitors and retention ... we're great at engaging outside? (need to see beyond ships \$ comparison per member) has a less valuable club member because we ship them less - what guidance can we give them on shipping bottles, top performers, by price band !!! what's the club visitor %?

# West Coast Visitors by Month, Change vs. 2021

|               | 2022   | Q4 2022 |
|---------------|--------|---------|
| OR            | -13.4% | -20.4%  |
| N. Willamette | -12.4% | -19.0%  |
| S. Willamette | -25.0% | -35.4%  |
| S. Oregon     | +3.8%  | +5.9%   |
| WA            | -2.1%  | -10.4%  |
| CA            | -2.0%  | -13.6%  |

# Oregon DTC Driven By Traditional Channels (75%)



- Tasting Room
- Club Shipments
- All Other

# Oregon Membership Decline

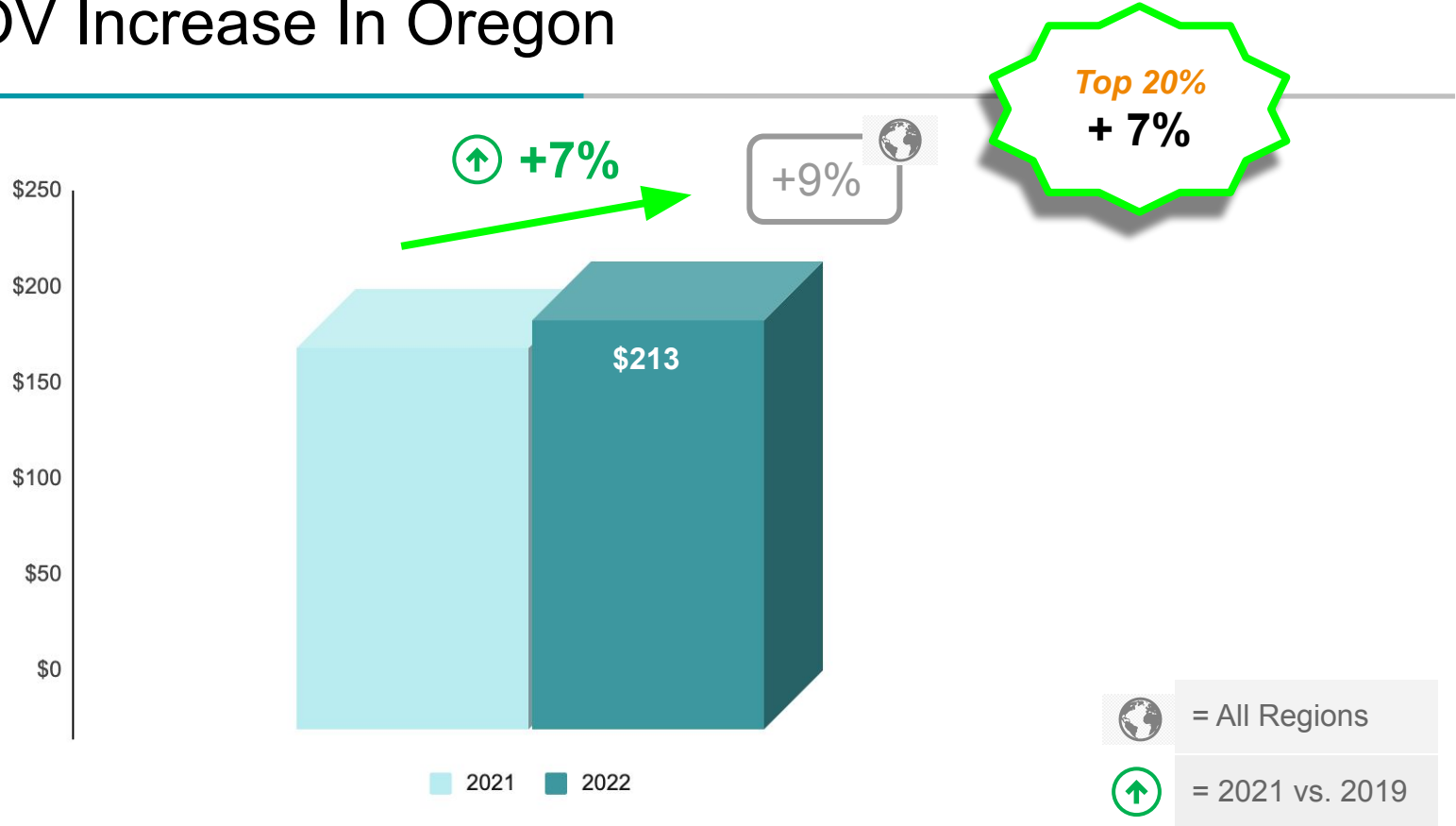


|      | Acquisition | Attrition | Net |
|------|-------------|-----------|-----|
| 2021 | +36%        | 23%       | 13% |
| 2022 | +27%        | 29%       | -2% |

# Retention: One Thing We Can Do To Grow Our Club Without More Visitation and Conversion ....

|                              | OR    | WA    | CA    |
|------------------------------|-------|-------|-------|
| Avg. Total Wine Club Members | 899   | 1,110 | 2,430 |
| % Change vs. 2021            | -2.5% | 1.0%  | +1.4% |
| Avg. Attrition Rate          | 28.7% | 26.2% | 24.5% |

# Club AOV Increase In Oregon



## STATE OF OREGON DTC

2/14/23

*presented by*



**John Keleher**

Founder

Community Benchmark

[johnk@communitybenchmark.com](mailto:johnk@communitybenchmark.com)



**Lesley Berglund**

Chairman

WISE Academy

[lesley@wineindustrysaleseducation.com](mailto:lesley@wineindustrysaleseducation.com)

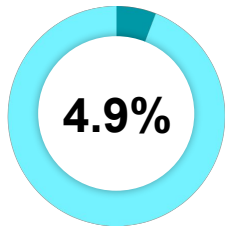
# Oregon Club Conversion Trend ... And Opportunity

Top 20%  
> 6.75%

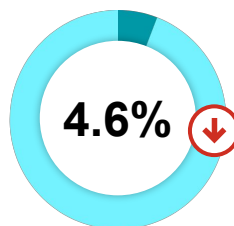
2022 vs. 2021 Visitation  
% Chg



2021

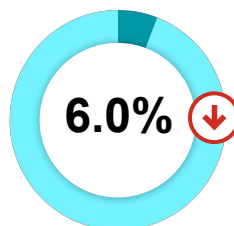
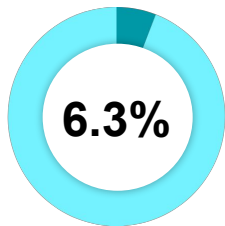


2022



↓ -0.3%

Oregon



↓ -0.3%

All Other

# Oregon Growth Levels in 2022



Total DTC Sales 2 Years

\$4.0M

\$3.0M

\$2.0M

\$1.0M

\$0.0M

⬇️ -2%



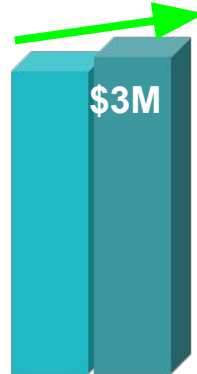
OR

⬆️ +1%



WA

⬆️ +4%



CA

Top 20%  
+ 23%

■ 2021 ■ 2022



= 2022 vs. 2021

# Revenue per Visitor Still Improving

2022 vs. 2021 Visitation  
% Chg

-13%



2022

72%



+13%

Purchase  
Conversion

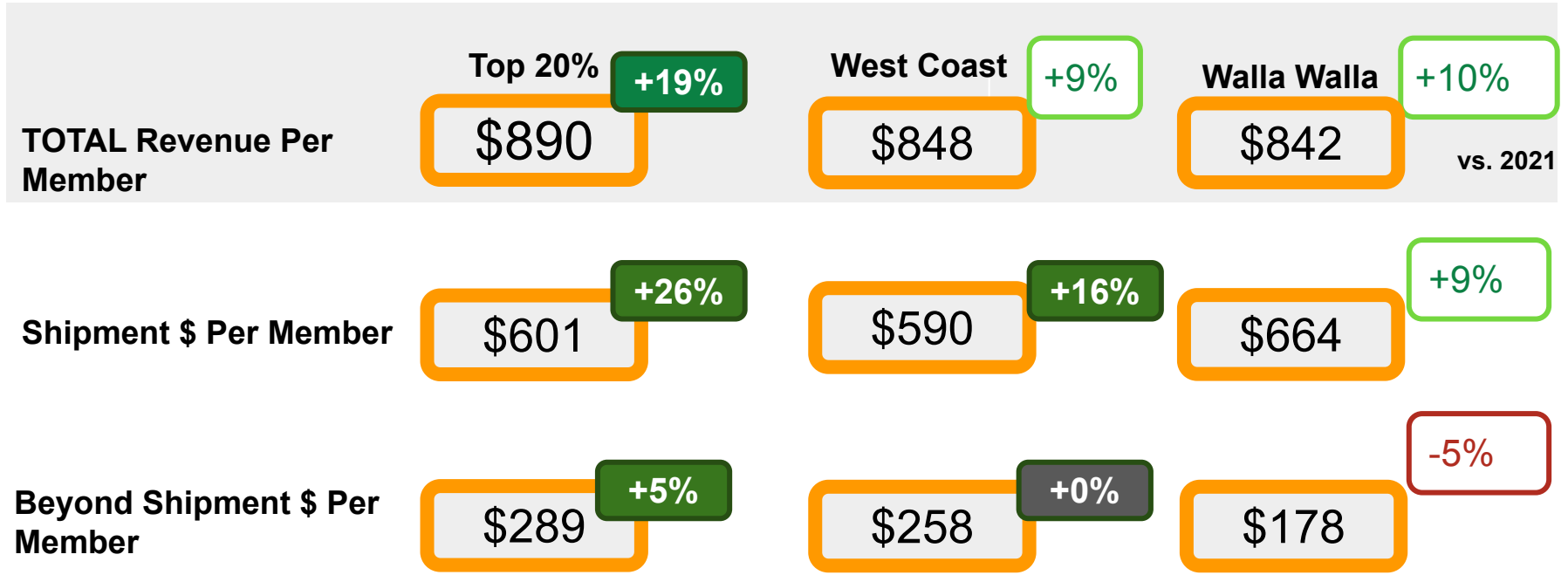
\$106



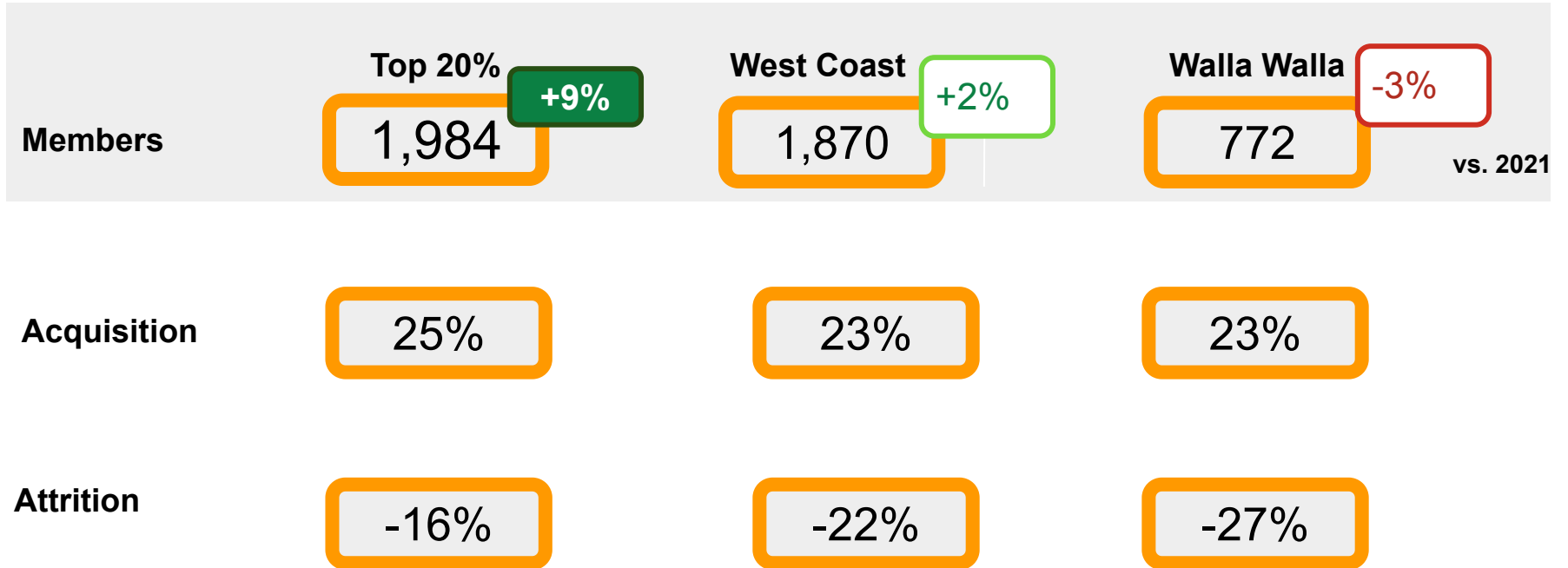
+5%

Average Sale

# Revenue Per Member Metrics



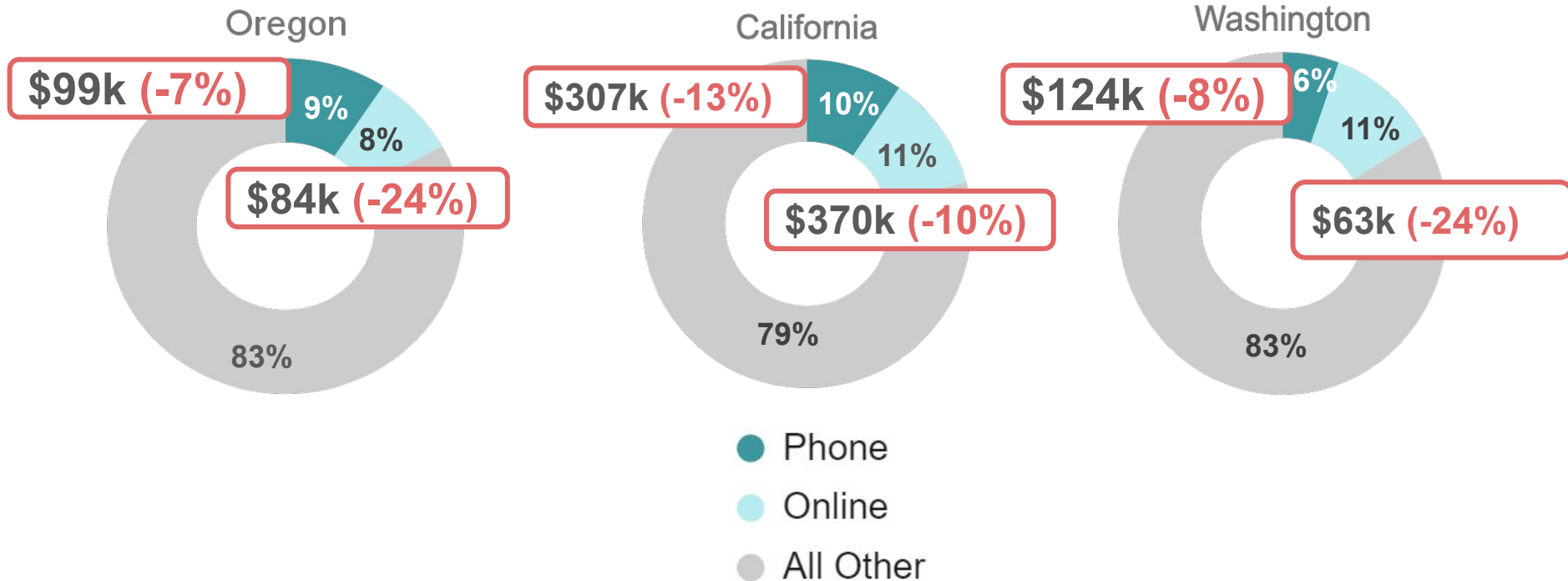
# Membership Growth



# Club Comps

|                          | OR            | WA           | CA            |
|--------------------------|---------------|--------------|---------------|
| <b>Ship Sales/Member</b> | \$554         | \$569        | \$695         |
| <b>Ships</b>             | 2.6 (-0.5%)   | 2.3(+8.8%)   | 3.0 (+1.9%)   |
| <b>Rev/Ship</b>          | \$213 (+9.1%) | \$247(+4.2%) | \$233 (+8.1%) |

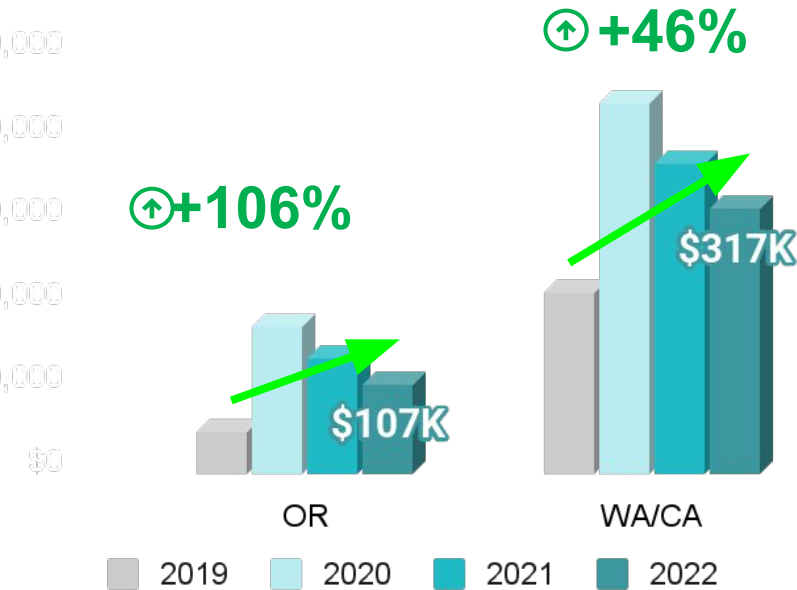
# Oregon DTC Driven By Traditional Channels (75%)



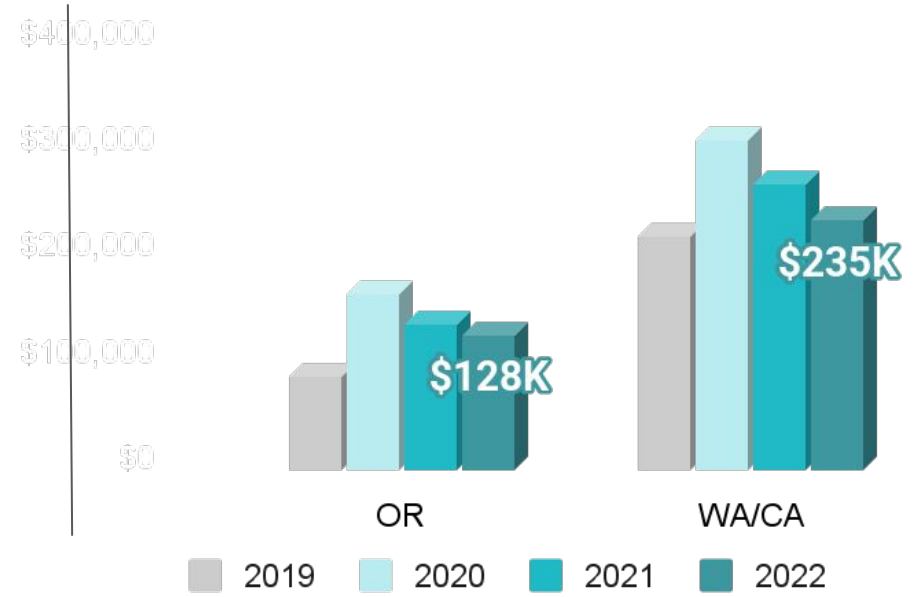
# Oregon Online Sales Champ - Growth Is Volume



Online Sales 4 Years



Phone Sales 4 Years

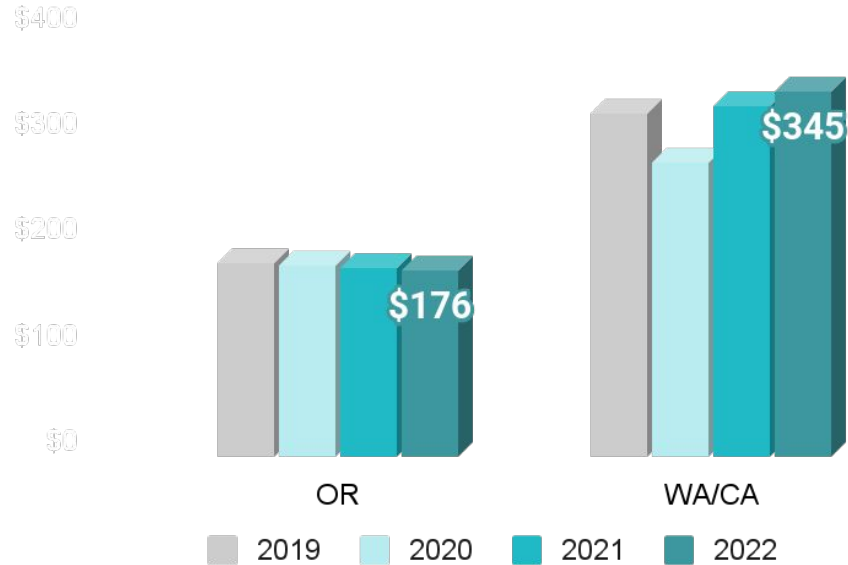


↑ = 2022 vs. 2019

# Oregon Online & Phone AOV



## Online AOV 4 Years



## Phone AOV 4 Years



# Oregon Online & Phone AOV



Online AOV 4 Years

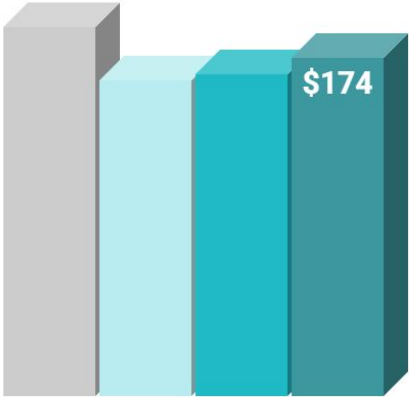


OR

■ 2019 ■ 2020 ■ 2021 ■ 2022



Phone AOV 4 Years



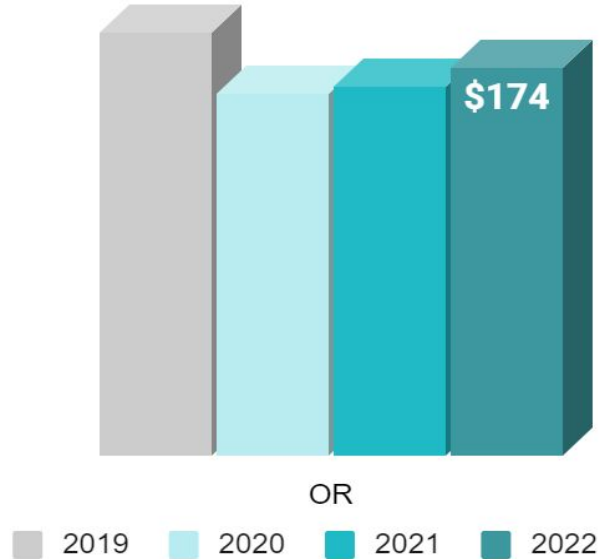
OR

■ 2019 ■ 2020 ■ 2021 ■ 2022

# Oregon Online Phone AOV



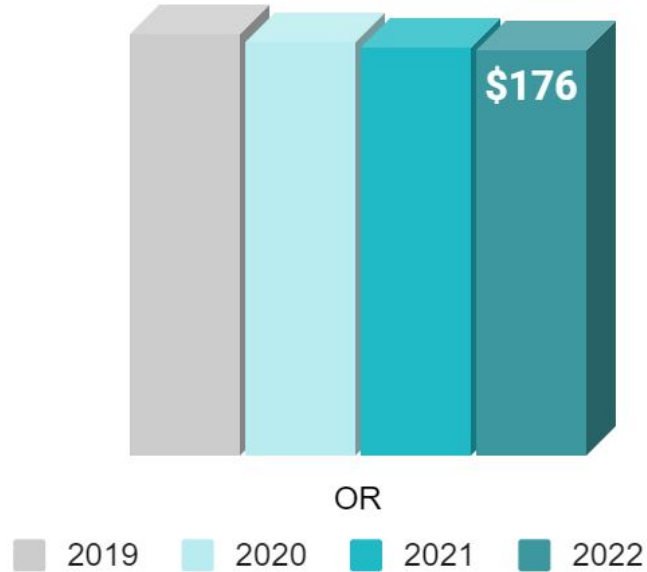
## Phone AOV 4 Years



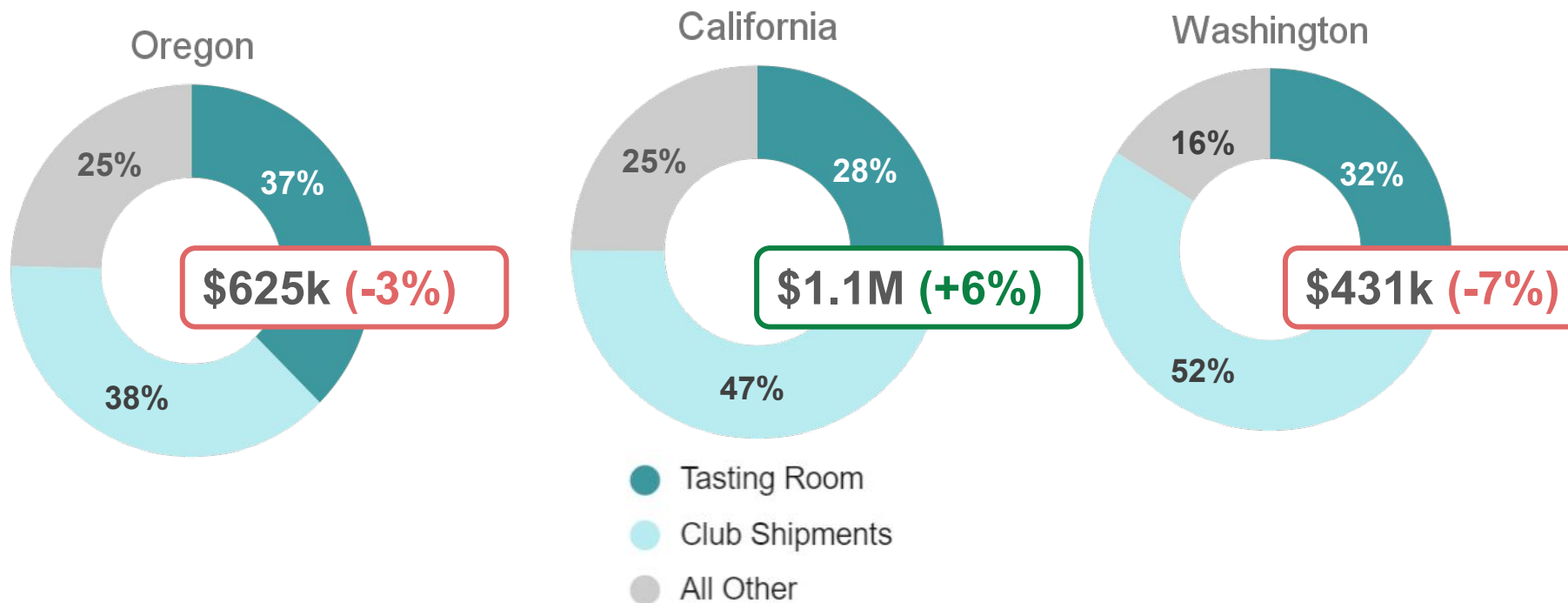
# Oregon Online AOV



Online AOV 4 Years



# Oregon Tasting Room Emphasis Tops All



# Shows OR does better AOV only in TR ...

| 2022 Average Order Value By Channel |       |       |       |
|-------------------------------------|-------|-------|-------|
|                                     | OR    | WA    | CA    |
| Tasting Room                        | \$106 | \$85  | \$123 |
| Club Shipment                       | \$213 | \$247 | \$233 |
| Online                              | \$176 | \$232 | \$324 |
| Phone                               | \$174 | \$231 | \$363 |

# AOV by Price Segment

---

| <b>Avg. Red Bottle Price</b> | <b>Tasting Room</b> | <b>Wine Club</b> | <b>Online</b> | <b>Phone</b> |
|------------------------------|---------------------|------------------|---------------|--------------|
| <b>\$0-35</b>                | <b>\$62</b>         | <b>\$121</b>     | <b>\$89</b>   | <b>\$281</b> |
| <b>\$36-50</b>               | <b>\$76</b>         | <b>\$171</b>     | <b>\$140</b>  | <b>\$130</b> |
| <b>\$51-\$70</b>             | <b>\$123</b>        | <b>\$250</b>     | <b>\$214</b>  | <b>\$202</b> |
| <b>\$71+</b>                 | <b>\$226</b>        | <b>\$427</b>     | <b>\$271</b>  | <b>\$280</b> |

# Bottles per Order

## 2022 Average Red Bottle Price

| OR | <b>\$49</b> |
|----|-------------|
| WA | <b>\$43</b> |
| CA | <b>\$59</b> |

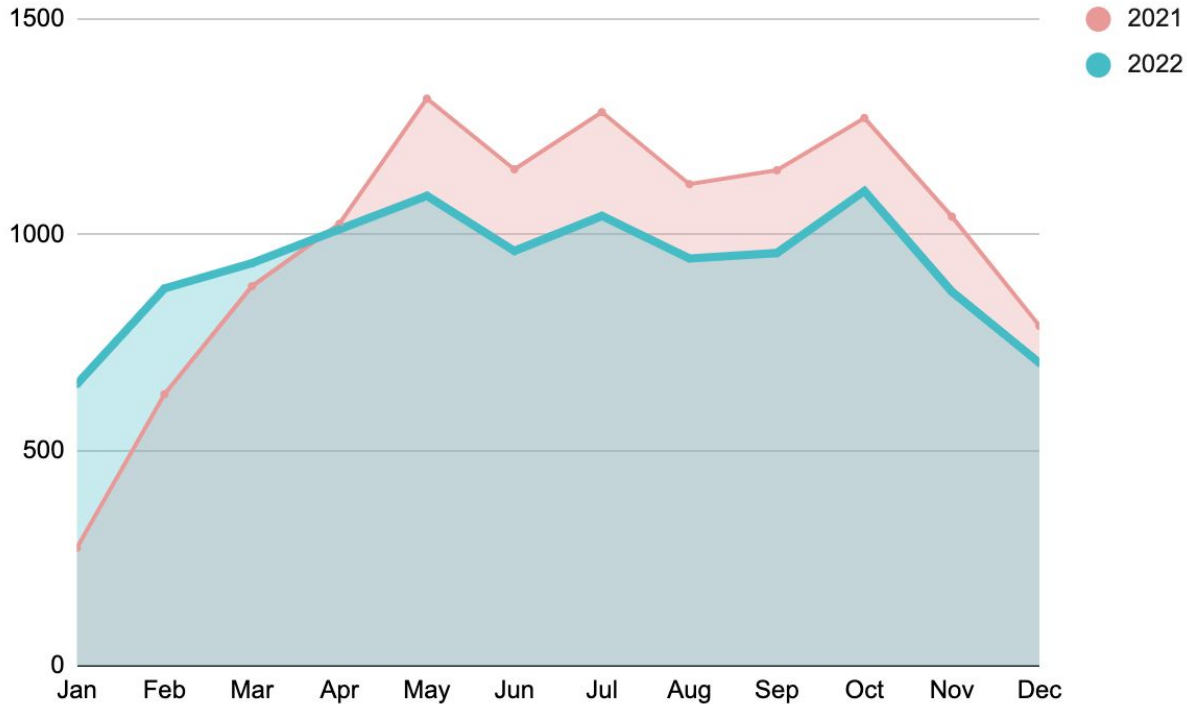
## 2022 Average Bottles per Order By Channel

|               | OR         | WA         | CA         |
|---------------|------------|------------|------------|
| Tasting Room  | <b>2.2</b> | <b>2.0</b> | <b>2.1</b> |
| Club Shipment | <b>4.3</b> | <b>5.7</b> | <b>3.9</b> |
| Online        | <b>3.6</b> | <b>5.4</b> | <b>5.4</b> |
| Phone         | <b>3.6</b> | <b>5.4</b> | <b>6.2</b> |

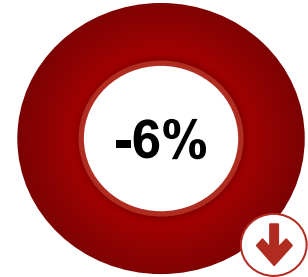
# AOV By Channel: 2022 vs. 2021

| 2022 Average Change in Order Value By Channel |            |            |             |
|---|------------|------------|-------------|
|   | OR         | WA         | CA          |
| Tasting Room                                  | <b>+3%</b> | <b>-4%</b> | <b>+5%</b>  |
| Club Shipment                                 | <b>+9%</b> | <b>+4%</b> | <b>+8%</b>  |
| Online  | <b>0%</b>  | <b>+3%</b> | <b>+1%</b>  |
| Phone   | <b>+5%</b> | <b>-2%</b> | <b>+22%</b> |

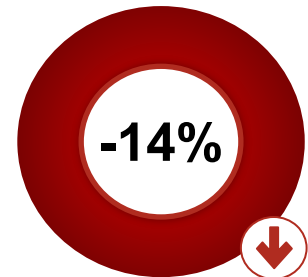
# West Coast Visitors by Month, 2 Years



Full Year vs 2021



April-December vs 2021



# OR Best at Weathering Worst Storm (Visitation)

|                     | OR            | WA            | CA            |
|---------------------|---------------|---------------|---------------|
| Visitation          | <b>8,215</b>  | <b>6,329</b>  | <b>13,034</b> |
| 2022 % chg          | <b>-10%</b>   | <b>0%</b>     | <b>-3%</b>    |
| Conversion to Order | <b>72%</b>    | <b>76%</b>    | <b>65%</b>    |
| 2022 % chg          | <b>+1%</b>    | <b>+2%</b>    | <b>+2%</b>    |
| Avg. Order Value    | <b>\$106</b>  | <b>\$85</b>   | <b>\$122</b>  |
| 2022 % chg          | <b>+18%</b>   | <b>+5%</b>    | <b>+12%</b>   |
| Tasting Room Sales  | <b>\$625k</b> | <b>\$431k</b> | <b>\$1.1M</b> |
| 2022 % chg          | <b>+7%</b>    | <b>+6%</b>    | <b>+9%</b>    |

# OR Best at Weathering Worst Storm (Visitation)

|                           | OR                 | WA                 | CA                 |
|---------------------------|--------------------|--------------------|--------------------|
| Visitation                | <b>-13%</b>        | <b>-2%</b>         | <b>-2%</b>         |
| Conversion To Order       | <b>72% (+13%)</b>  | <b>76% (-0.5%)</b> | <b>\$65 (+3%)</b>  |
| Avg. Order Value          | <b>\$106 (+5%)</b> | <b>\$85 (-4%)</b>  | <b>\$122 (+5%)</b> |
| <b>Tasting Room Sales</b> | <b>\$625k</b>      | <b>\$431k</b>      | <b>\$1.1M</b>      |