

ENOLYTICS



State of Oregon DTC –  
Part One: Key Wine Industry Trends

# Questions that We'll Address

Today:



- How Does OREGON compare to the rest of the US?
- Where is OREGON different than the US?
- How did OREGON perform in 2022 compared to 2021?
- Has pricing changed? And how?
- What other factors should we consider?



How do we know what we know...

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# ACCELERATING GROWTH THROUGH THE POWER OF FIRST PARTY DATA

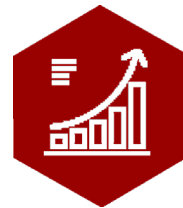
User-friendly advanced analytics. SaaS: Ecommerce and Depletion (Sales). Wine and Spirits.



**SEGMENTATION**



**QUERY-BASED  
REPORTING**



**FORECASTING**



**DATA CLEANSING**



**VIRTUAL ANALYST**

A photograph of three people in a vineyard. On the left, a Black man in a grey shirt and white t-shirt looks down. In the center, a woman in a blue blazer and polka-dot dress smiles while holding a bunch of red grapes. On the right, a man with a beard wearing a straw hat, a plaid shirt, and a green vest looks towards the camera. The background shows rows of grapevines under a clear sky.

# 2023 Annual Report

With Key Takeaways  
for Wine DTC

WINE **DIRECT** x ENOLYTICS

# A little bit about myself



- 25 years of experience in tech (healthcare) and strategy
- Co-Founder and lead analyst for Enolytics
- Brainstorms with customers daily and incorporates their feedback
- Ran a 500M USD business unit



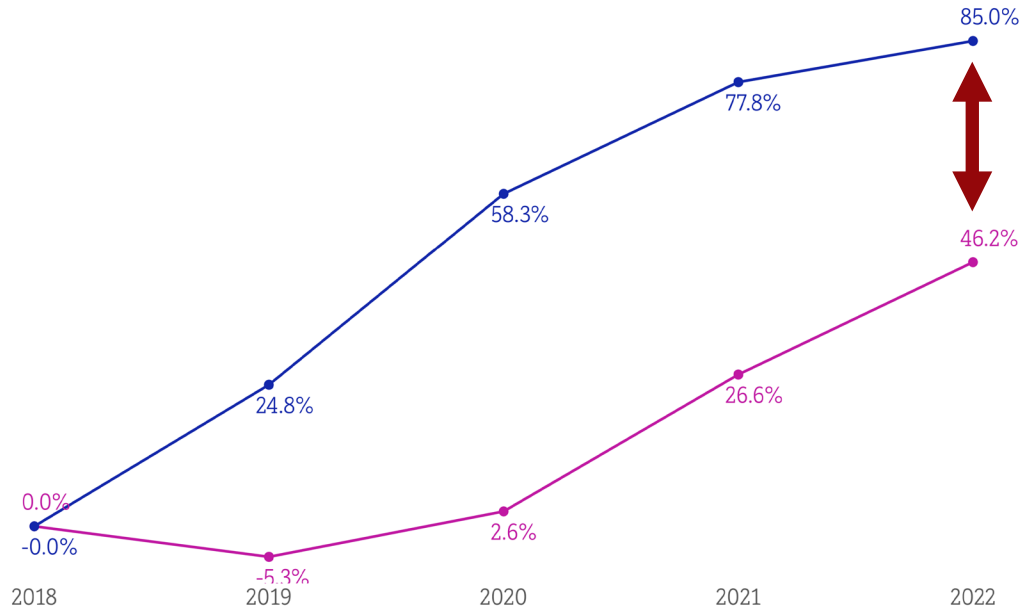
# OREGON: DTC General Overview

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# OREGON

Net Sales Growth Since 2018 (Q1-Q4) OR

Net Sales Cases Sold (Excl \$0)

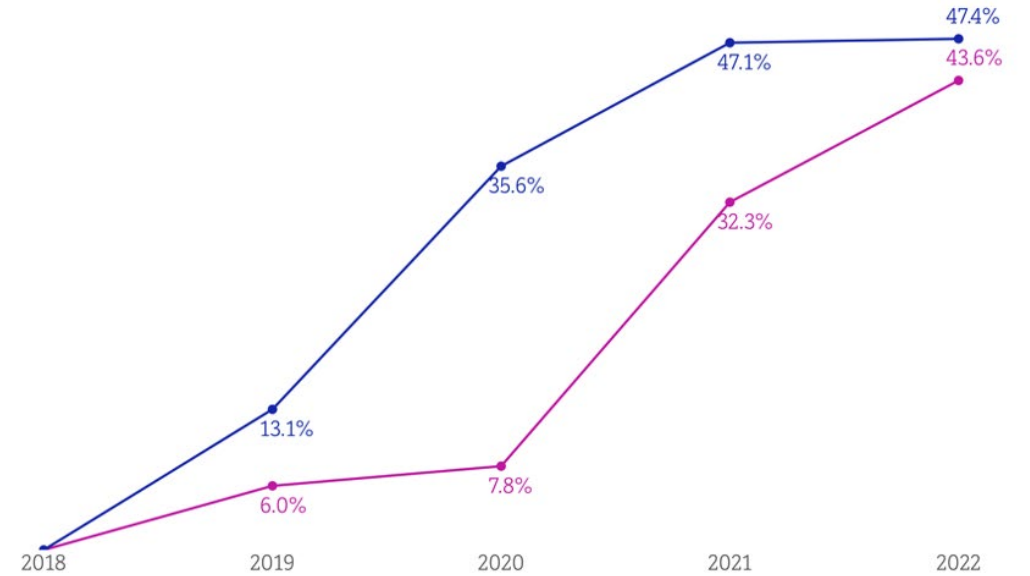


Cases Sold: + 85% - Revenue: + 46%

# USA

Net Sales Growth Since 2018 (Q1-Q4) - US

Net Sales Cases Sold (Excl \$0)



Cases Sold: + 47% - Revenue: + 44%

## 2022 (Q1-Q4) - US Growth Compared to 2021 by Wine Region (Q1-Q4) - US

Wine Region	Net Sales	Net Sales Wine	Net Sales Non-Wine	Cases Sold	Unique Customers	AOV	Discount %	Avg Bottle Sold Price	Avg Bottles/Order	Avg Orders/Customer
<b>Totals</b>	7.5%	6.9%	10.9%	-0.4%	-3.6%	4.8%	-2.1%	8.1%	3.3%	-0.0%
North Coast	9.6% ↑	7.8% ↑	25.3% ↑	-0.9% ↓	-1.7% ↓	2.1% ↑	-7.3% ↓	9.6% ↑	2.0% ↑	-1.4% ↓
Central Coast	7.5% ↑	7.8% ↑	3.8% ↑	2.2% ↑	-7.7% ↓	5.1% ↑	-14% ↓	5.9% ↑	7.3% ↑	3.3% ↑
Rest of California	8.8% ↑	8.6% ↑	11.5% ↑	0.4% ↑	3.1% ↑	1.3% ↑	-1.3% ↓	6.3% ↑	-0.8% ↓	-0.5% ↓
<b>OR</b>	10.9% ↑	9.3% ↑	22.9% ↑	-0.0% ↓	-1.9% ↓	8.2% ↑	-8.8% ↓	12.1% ↑	6.3% ↑	-5.5% ↓
WA	8.2% ↑	8.3% ↑	6.2% ↑	3.8% ↑	0.9% ↑	5.1% ↑	-1.9% ↓	9.1% ↑	-2.2% ↓	0.3% ↑
East Coast	-3.7% ↓	-2.5% ↓	-7.8% ↓	-8.4% ↓	-10.6% ↓	8.3% ↑	35.7% ↑	6.2% ↑	4.6% ↑	-1.4% ↓
Non-Coastal	14% ↑	2.2% ↑	-1.5% ↓	-0.3% ↓	-5.8% ↓	3.9% ↑	3.3% ↑	2.4% ↑	3.2% ↑	3.0% ↑

### OREGON:

- Highest Revenue
- Biggest drop in discounts
- Biggest Avg Bottle Price Increase
- Highest AOV increase

### OREGON:

- Highest decline in Orders/Customer
- Drop in unique customers
- Cases Sold flat

# 2022 Q4 Results compared to 2021 Q4



Wine Region	Q	Net Sales	Cases Sold
<b>Totals</b>	▲	-7.9%	-9.9%
North Coast		-10.8% ↓	-14.8% ↓
Central Coast		-7.9% ↓	-10.6% ↓
Rest of California		-4.4% ↓	-2.7% ↓
OR		-1.3% ↓	-8.8% ↓
WA		-8.7% ↓	-14.1% ↓
East Coast		-7.4% ↓	-7.8% ↓
Non-Coastal		-5.7% ↓	-5.2% ↓



A little bit more about Pricing

### Average Order Value Annual Growth (Q1-Q4) OR



### Average Order Value Annual Growth (Q1-Q4) - US



### Avg Bottle Sold Price Growth Since 2018 (Q1-Q4) OR

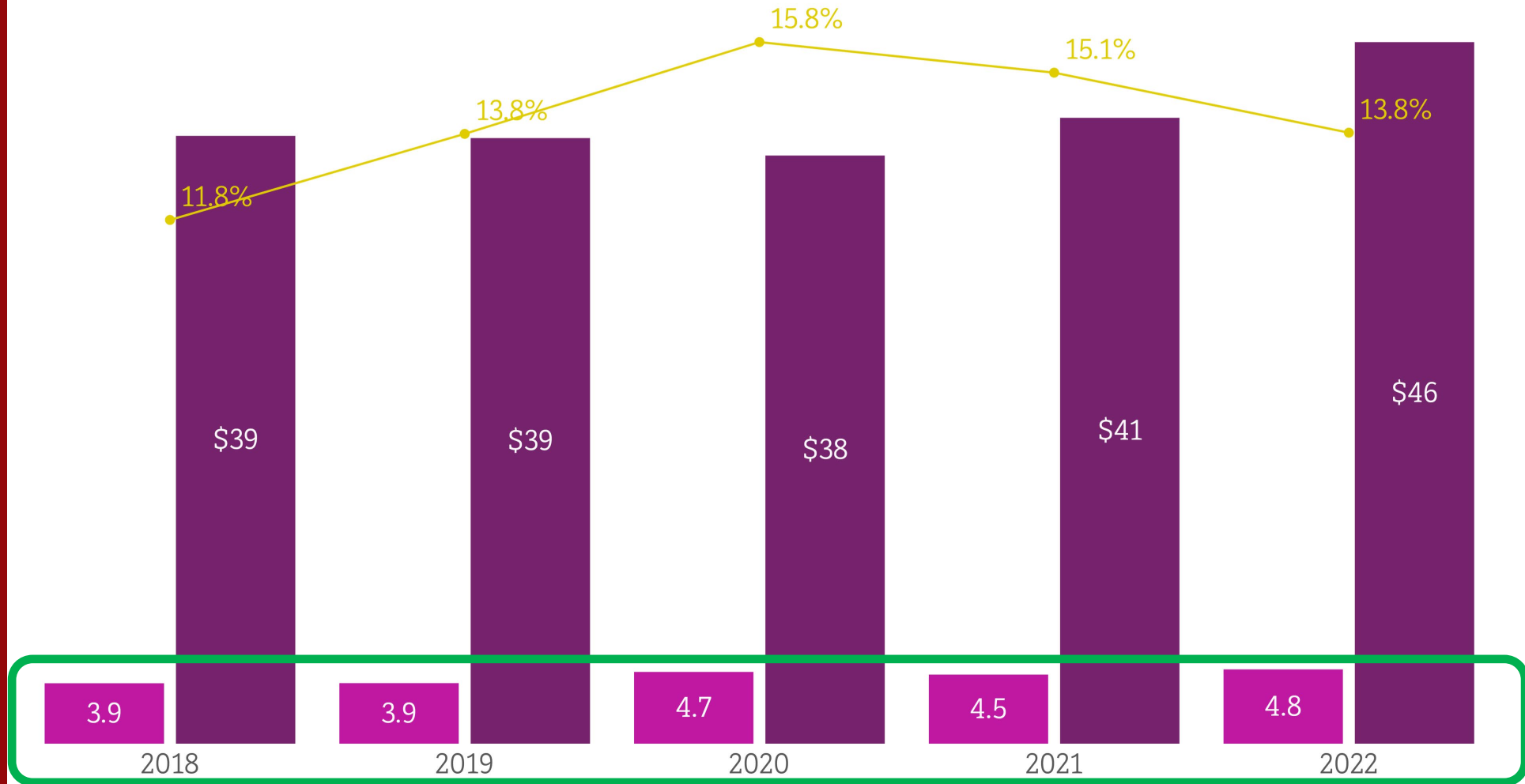


### Avg Bottle Sold Price Growth Since 2018 (Q1-Q4) - US



### Avg Sold Price and Discounting Since 2018 (Q1-Q4) OR

■ Bottles/Order (Excl \$0) ■ Avg Sold Price Per Bottle (Excl \$0) — Discount % (Excl \$0)





Looking at the  
OREGON  
wine performance  
through a different  
kind of lens

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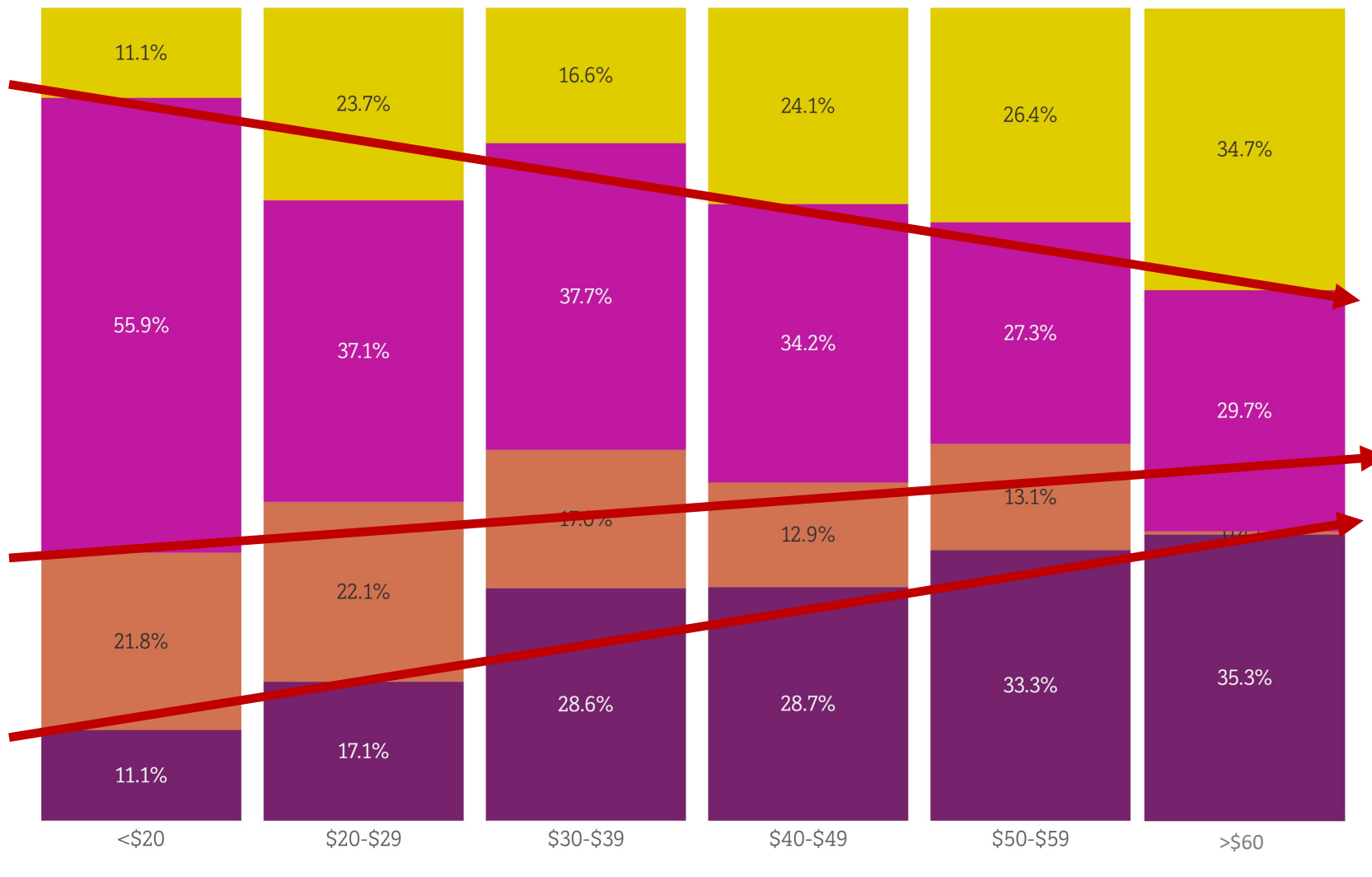
- 'First time' vs 'repeat' vs club
- Unique customers
- gender
- generation
- winery average bottle price



# First Time Buyers vs. Repeat Buyers

## Price Range % Net Sales By Contact Source 2022 (Q1-Q4) OR

■ 1stTimeCustomer ■ ClubMember ■ Guest Account ■ RepeatCustomer



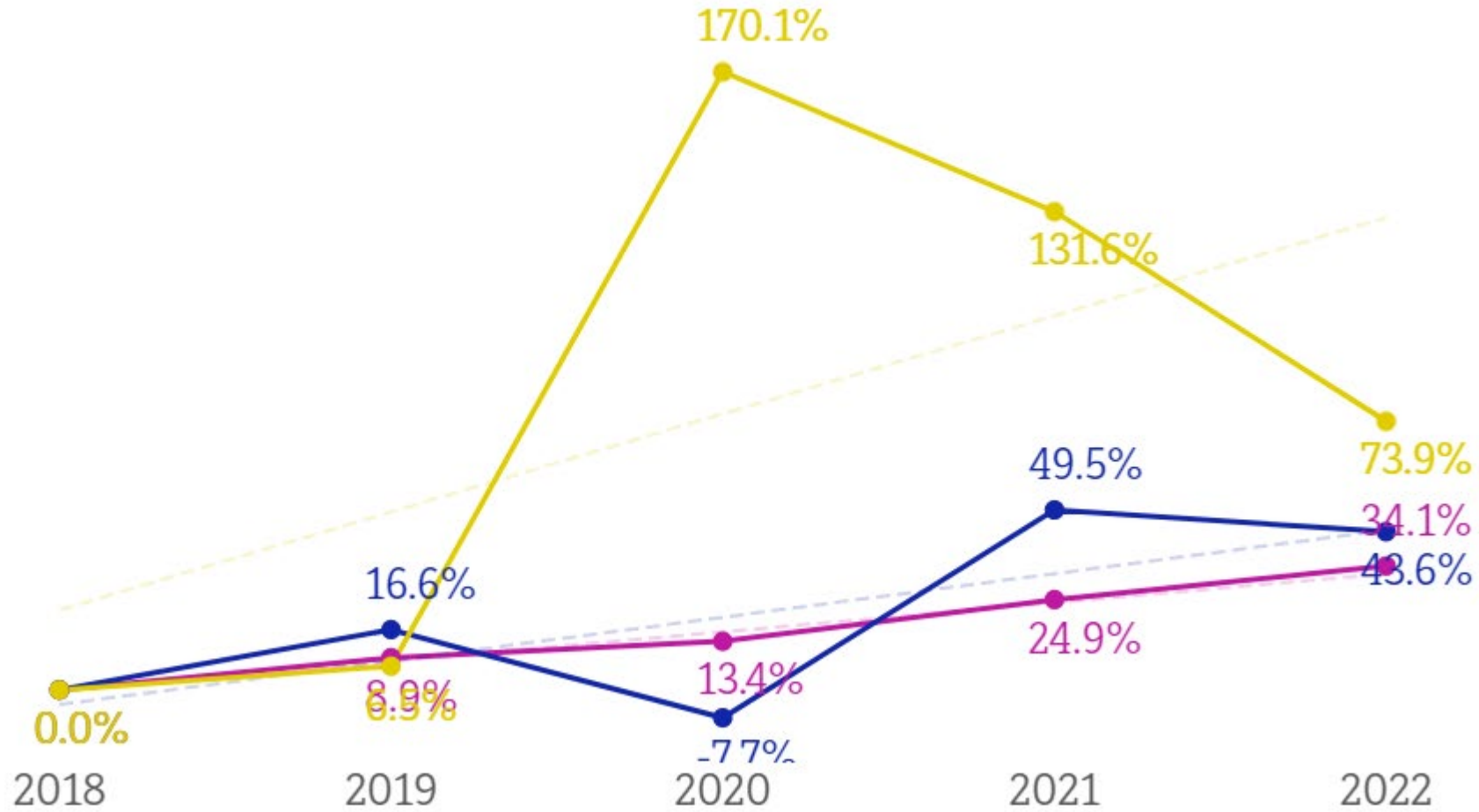
A large, dense pile of wine corks, many with labels, filling the entire frame. The corks are light-colored and show signs of use. Labels include various text such as "MONFORTESU ALBA", "CASTAGNE", "2011", "DOMAINE", "BOUTEILLE", "CHATEAU", "MIS EN", "500", "COLLINS", "FAMILIA", "Capatris", "CHATEAU", "BOUTEILLE", "2011", "2013", "2014", "2015", "2016", "2017", "2018", "2019", "2020", "2021", "2022", "2023", "2024", "2025", "2026", "2027", "2028", "2029", "2030", "2031", "2032", "2033", "2034", "2035", "2036", "2037", "2038", "2039", "2040", "2041", "2042", "2043", "2044", "2045", "2046", "2047", "2048", "2049", "2050", "2051", "2052", "2053", "2054", "2055", "2056", "2057", "2058", "2059", "2060", "2061", "2062", "2063", "2064", "2065", "2066", "2067", "2068", "2069", "2070", "2071", "2072", "2073", "2074", "2075", "2076", "2077", "2078", "2079", "2080", "2081", "2082", "2083", "2084", "2085", "2086", "2087", "2088", "2089", "2090", "2091", "2092", "2093", "2094", "2095", "2096", "2097", "2098", "2099", "2100".

# Unique Buyers

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## Unique Customer Growth by Major Channel Since 2018 (Q1-Q4) OR

Club POS Website



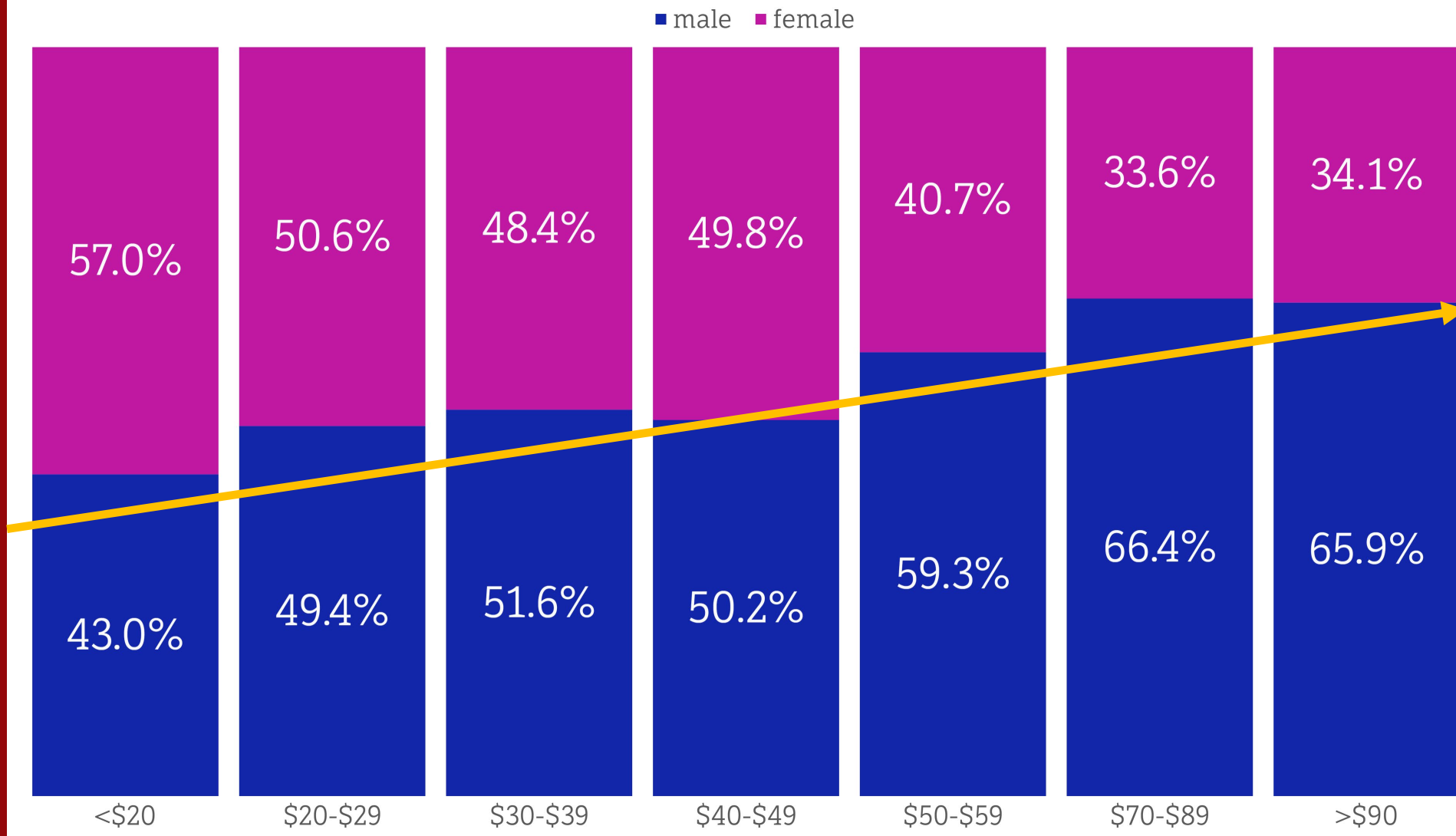
	OR	USA
POS	44%	36%
Club	34%	20%
Website	74%	50%



























# Gender and Generation

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### 2022 Net Sales by Gender by Price Range (Q1-Q4) OR



CATEGORY	Silent Generation	Boomers	Gen X	Millennials	Gen Z	Gen Alpha
Slang terms	 <p>We prefer proper English if you please</p> <p>Born: &lt; 1946</p>	 <p>Be cool Peace Groovy Way out</p> <p>Born: 1946-1964 Age: 57-75</p>	 <p>Dude Ace Rad As if Wicked</p> <p>Born: 1965-1979 Age: 42-56</p>	 <p>Bling Funky Doh Foshizz Whassup?</p> <p>Born: 1980-1994 Age: 27-41</p>	 <p>🔥 Fam GOAT Slay Yass queen</p> <p>Born: 1995-2009 Age: 12-26</p>	 <p>lit yeet hundo oof in idrc</p> <p>Born: 2010-2024 Age: under 12</p>
Social markers	World War II 1939-1945	Moon landing 1969	Stock market crash 1987	September 11 2001	GFC 2008	COVID-19 2020
Iconic cars	 Model T Ford Final, 1927	 Ford Mustang 1964	 Holden Commodore 1978	 Toyota Prius 1997	 Tesla Model S 2012	 Autonomous vehicles 2020s
Iconic toys	 Roller skates	 Frisbee	 Rubix cube	 BMX bike	 Folding scooter	 Fidget spinner
Music devices	 Record player LP, 1948	 Audio cassette 1962	 Walkman 1979	 iPod 2001	 Spotify 2008	 Smart speakers Now

2022 DTC Net Sales

3%

40%

35%

21%

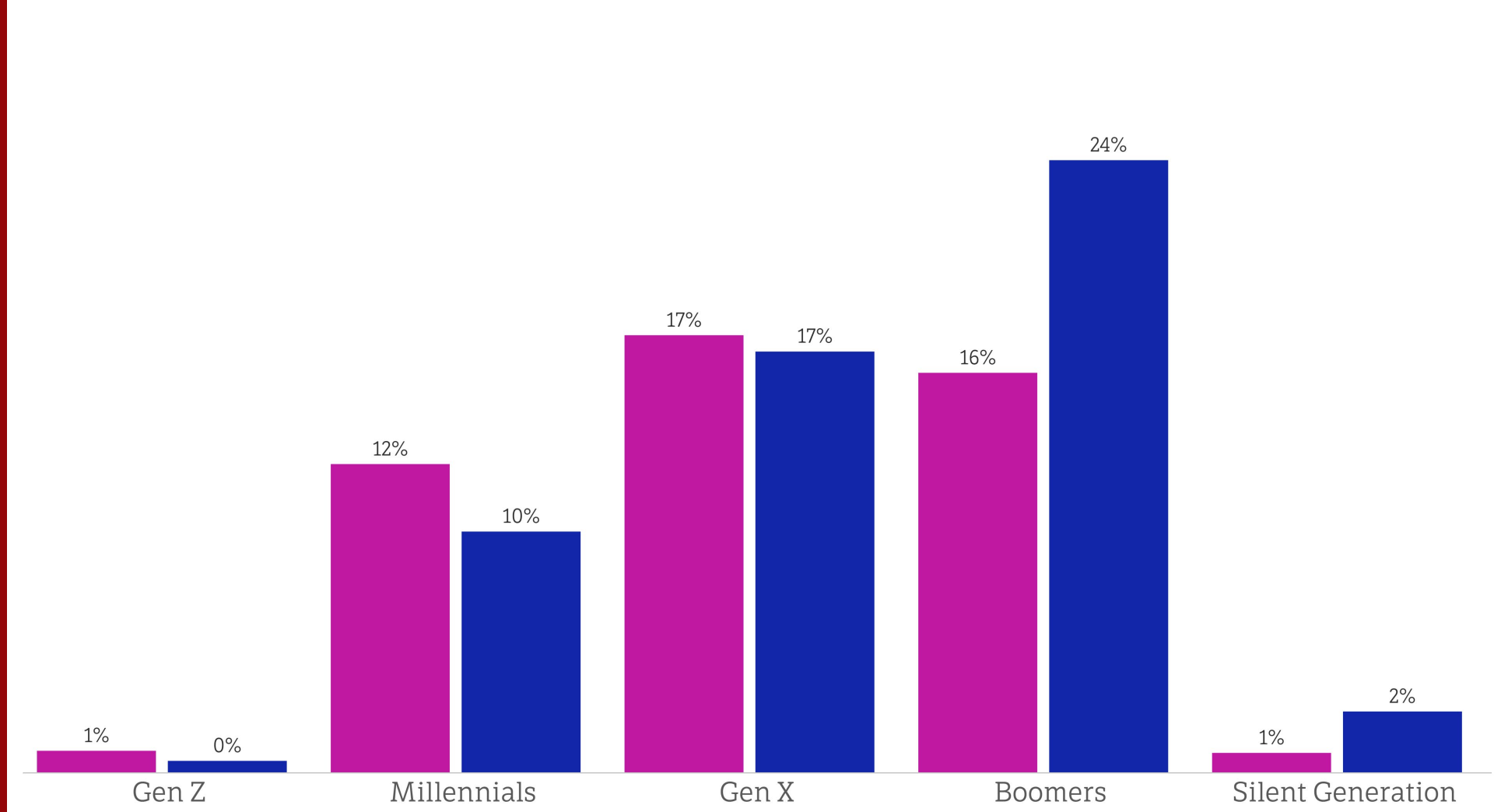
1%

## 2022 (Q1-Q4) OR Growth Compared to 2021 by Generation (Q1-Q4) OR

Generation	Net Sales	Net Sales Wine	Net Sales Non-Wine	Cases Sold	Unique Customers	AOV	Discount %	Avg Bottle Sold Price	Avg Bottles/Order	Avg Orders/Customer
Millennials	14.0% ↑	13.7% ↑	17.8% ↑	3.6% ↑	-5.4% ↓	11.8% ↑	-8.9% ↓	13.4% ↑	8.6% ↑	-1.1% ↓
Gen X	14.5% ↑	14.2% ↑	19.0% ↑	2.5% ↑	-2.8% ↓	11.2% ↑	-10.5% ↓	14.6% ↑	7.9% ↑	-3.7% ↓
Boomers	10.1% ↑	9.5% ↑	20.0% ↑	-0.5% ↓	-4.4% ↓	8.0% ↑	-8.2% ↓	12.0% ↑	7.1% ↑	-3.9% ↓

## Gender and Generation by Percent of 2022 Net Sales (Q1-Q4) OR

■ female ■ male

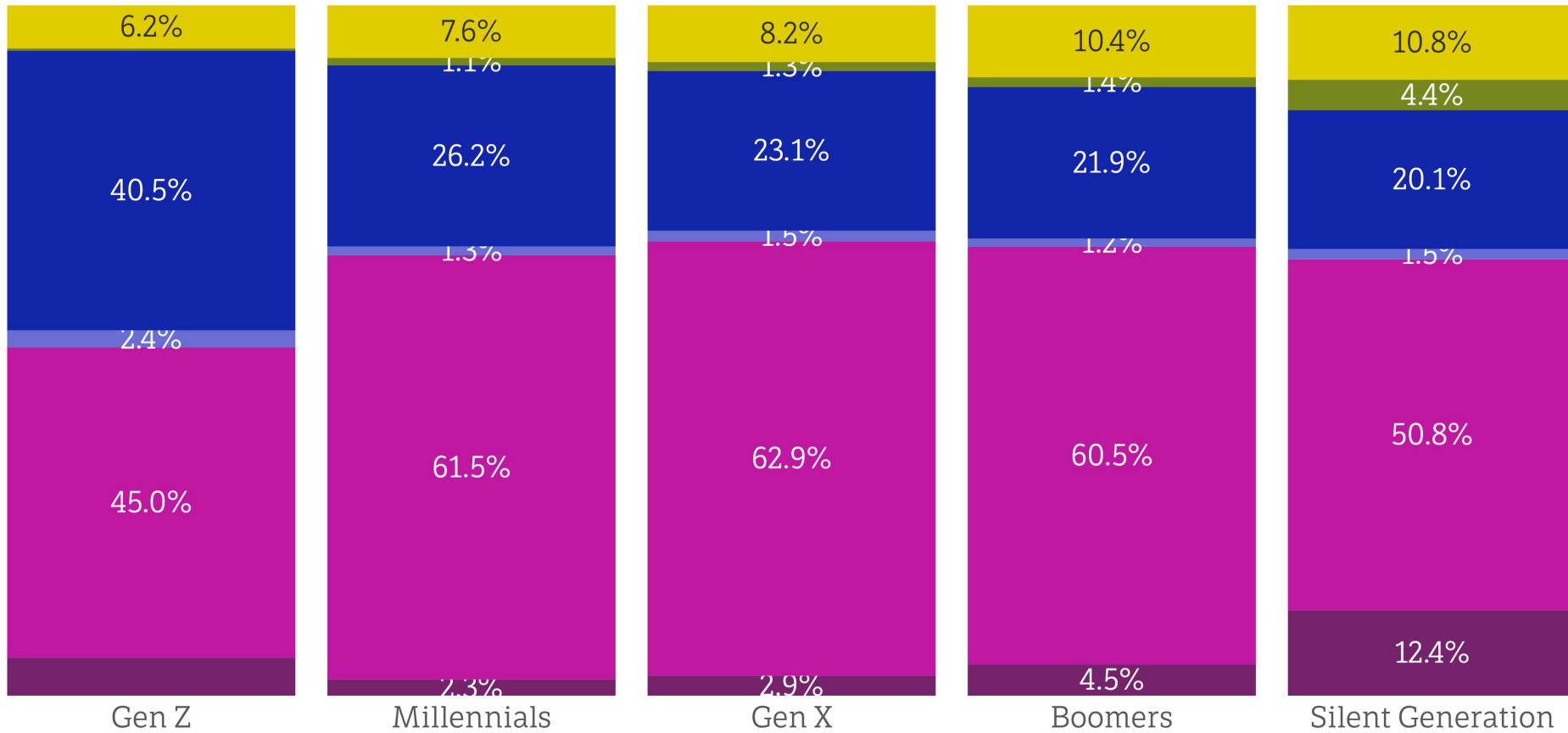


## 2022 AOV by Gender and Generation (Q1-Q4) OR

	Gen Z	Millennials	Gen X	Boomers	Silent Generation
male	\$122	\$240	\$294	\$287	\$260
female	\$98	\$175	\$211	\$196	\$179

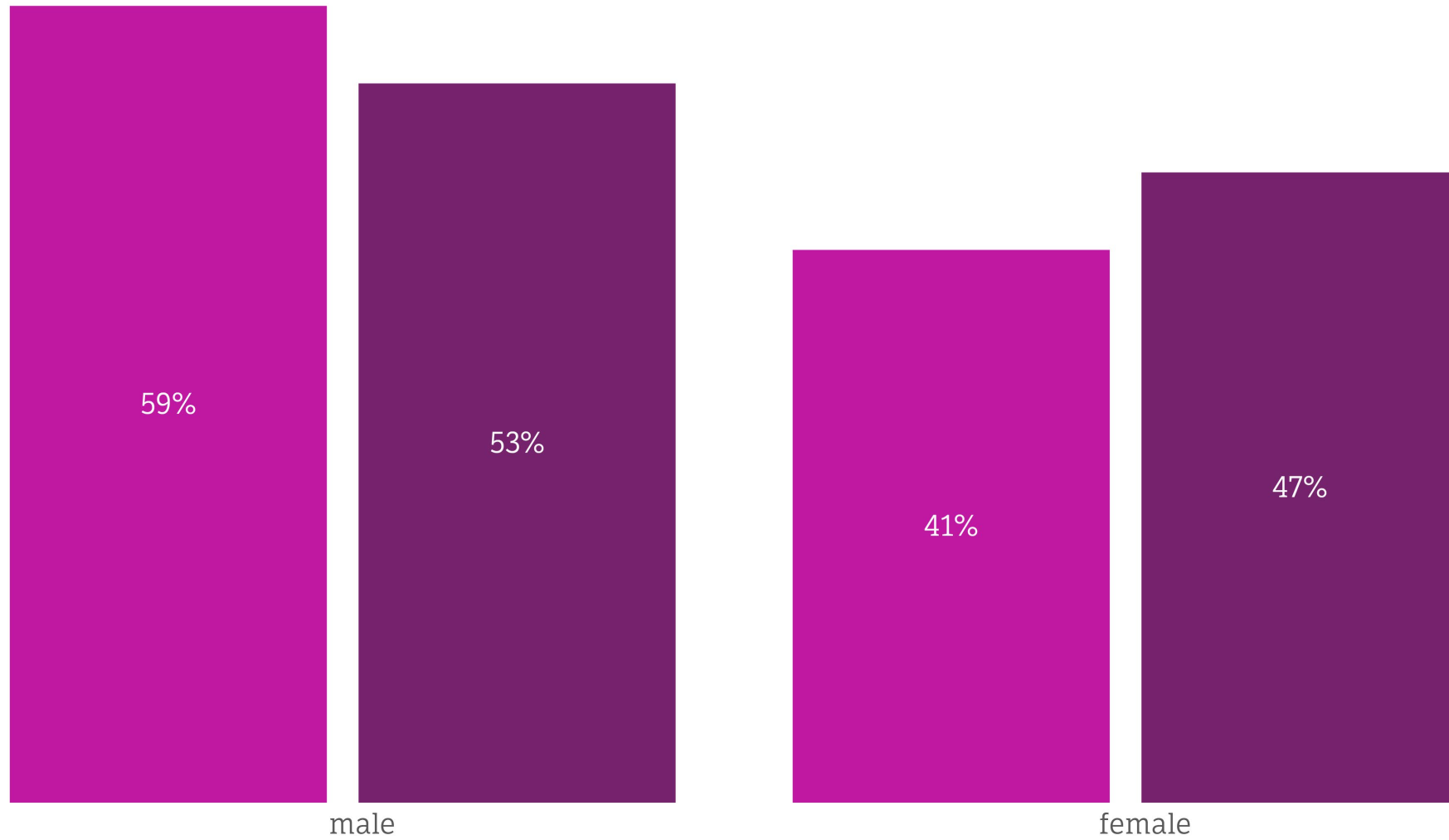
## 2022 YTD Net Sales by Channel by Generation (Q1-Q4) OR

■ AdminPanel ■ Club ■ Events ■ POS ■ Telemarketing ■ Website



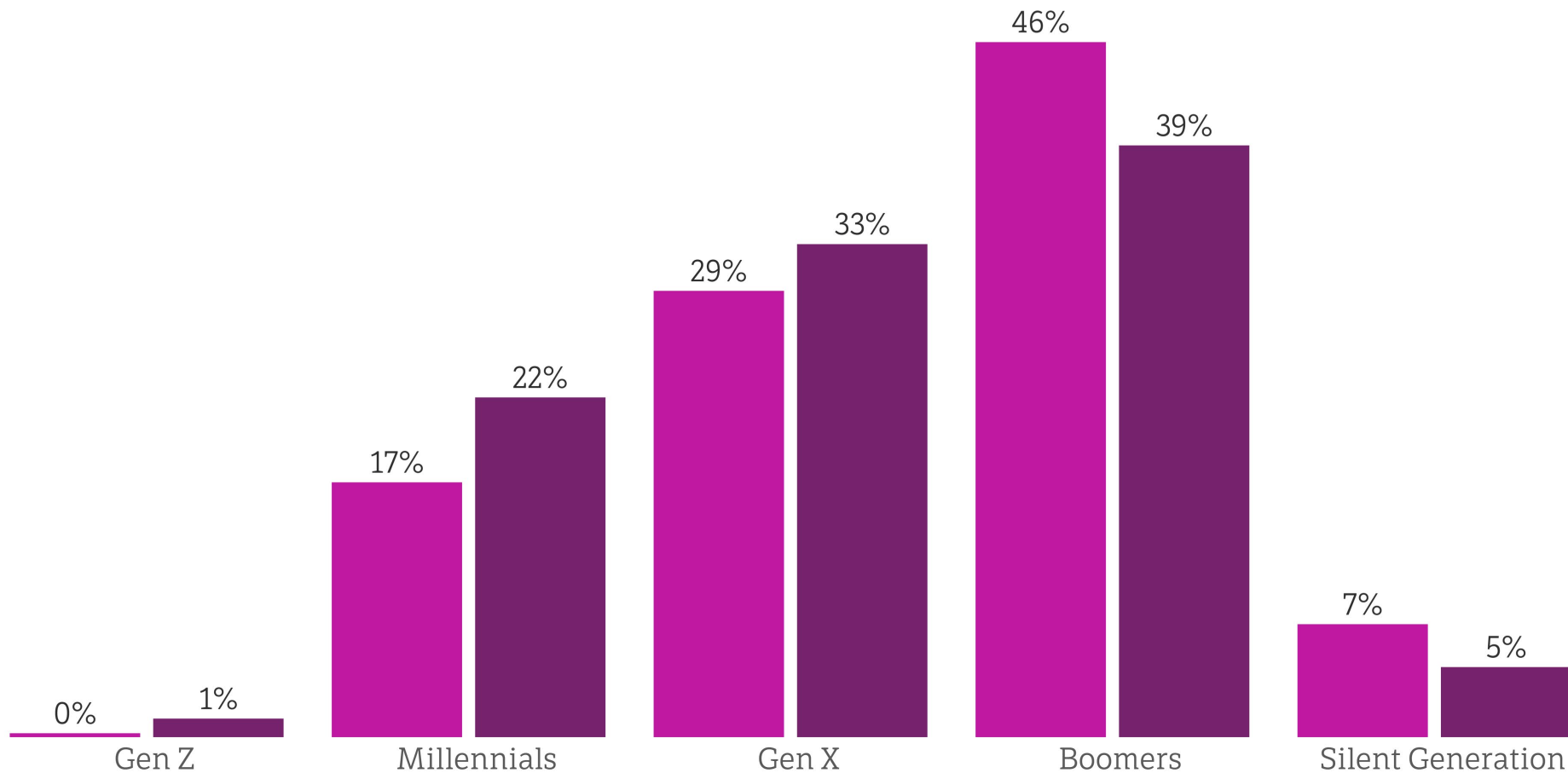
### Gender as % of Cases Sold (Q1-Q4) OR

■ 2018 % of Cases Sold ■ 2022 % of Cases Sold



### Cases Sold by Generation 2018 vs 2022 (Q1-Q4) OR

■ 2018 % of Cases Sold ■ 2022 % of Cases Sold





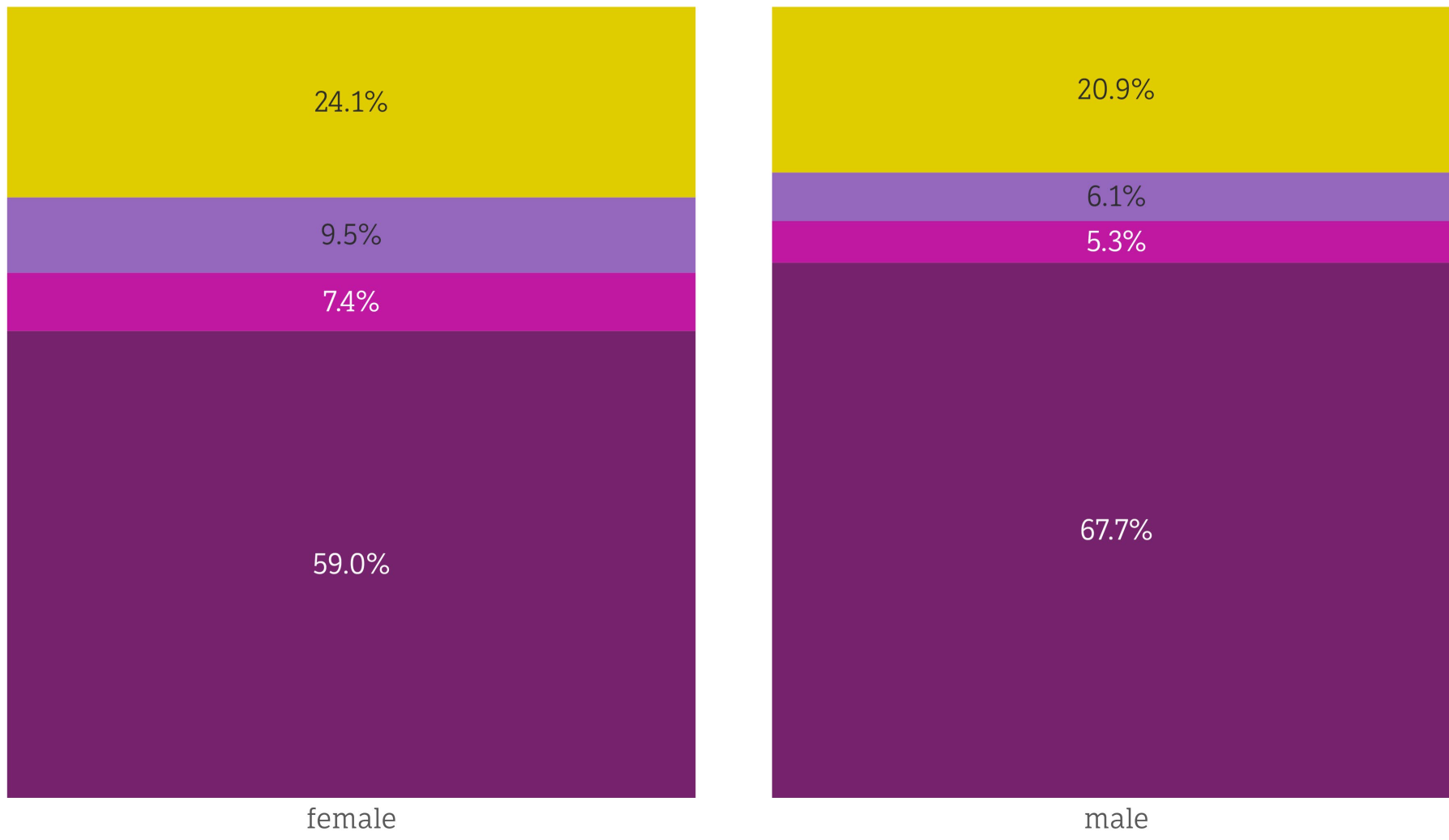
# Wine Types

## 2022 (Q1-Q4) OR Growth Compared to 2021 by Wine Type (Q1-Q4) OR

Wine Type	Net Sales	Cases Sold	Unique Customers	Discount %	Avg Bottle Sold Price
<b>Totals</b>	<b>10.9%</b>	<b>-0.0%</b>	<b>-2.0%</b>	<b>-8.8%</b>	<b>12.1%</b>
Red	10.3% ↑	-2.6% ↓	-5.8% ↓	-8.0% ↓	13.8% ↑
White	4.4% ↑	-4.1% ↓	-2.4% ↓	-4.4% ↓	10.2% ↑
Rosé	4.0% ↑	0.9% ↑	-10.8% ↓	1.9% ↑	4.0% ↑
Sparkling	21.1% ↑	10.0% ↑	9.1% ↑	-2.8% ↓	10.3% ↑

### 2022 YTD Cases Sold Wine Color by Gender (Q1-Q4) OR

■ White ■ Sparkling ■ Rosé ■ Red



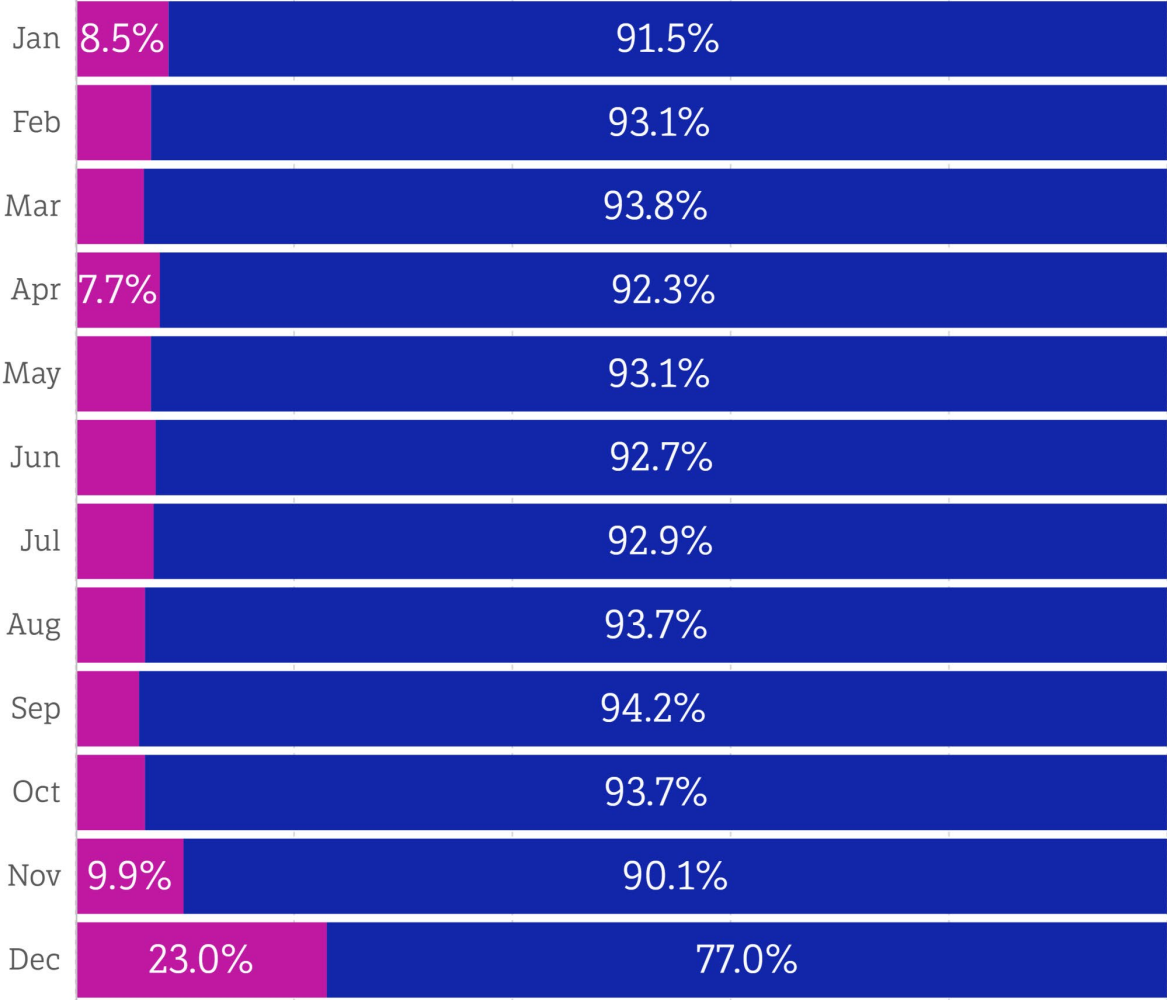


Gifts! How important are they?

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# % of Orders that are gifts - OR

■ Likely ■ Unlikely



# Request your own free comparison/benchmark report

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Register for a Free 30 Day Trial

Schedule a Demo

## Request your DTC Comparison Report

Curious how your winery stacks up to others in your cohort? Now you can with Comparison Reports, providing visibility of your DTC performance through apples-to-apples comparisons on a wide range of indicators.

WINE+IRECT x ENOLYTICS



### Request Your Comparison Report Now

Email (we can only send comparison reports to winery email addresses)\*

First name\*

Last name\*


Phone number

<https://info.enolytics.com/comparison-report-request>



Q & A

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