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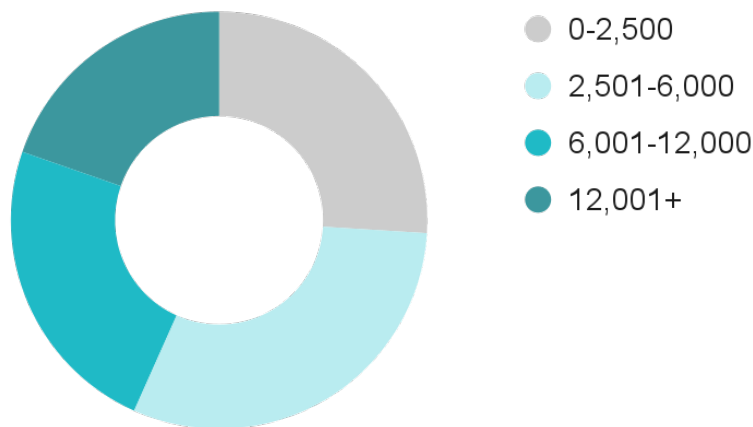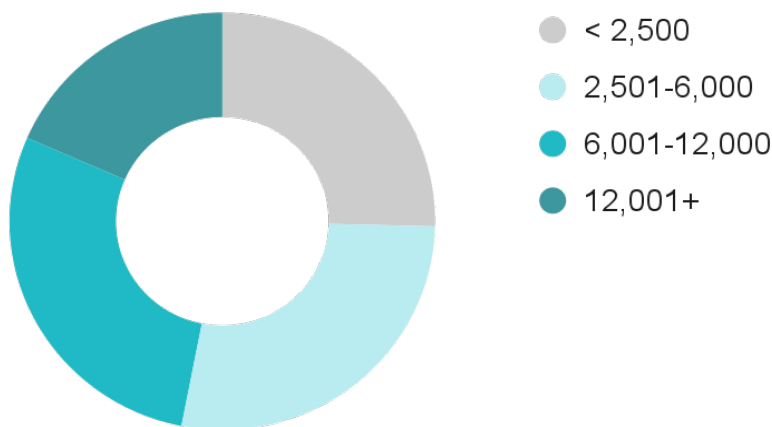
Percent of Wineries who grew total DTC sales in 2023 vs. 2024

Softness in DTC is being driven primarily by sinking tasting room sales and online sales; being offset by Club Allocations. Off-site Events is the only channel showing substantial growth.

2024 Total Percent Change by Revenue Channel Value ($) vs. 2023

Declining tasting room sales are being driven mainly by lower visitor counts – as revenue per visitor has been relatively stable or rising.
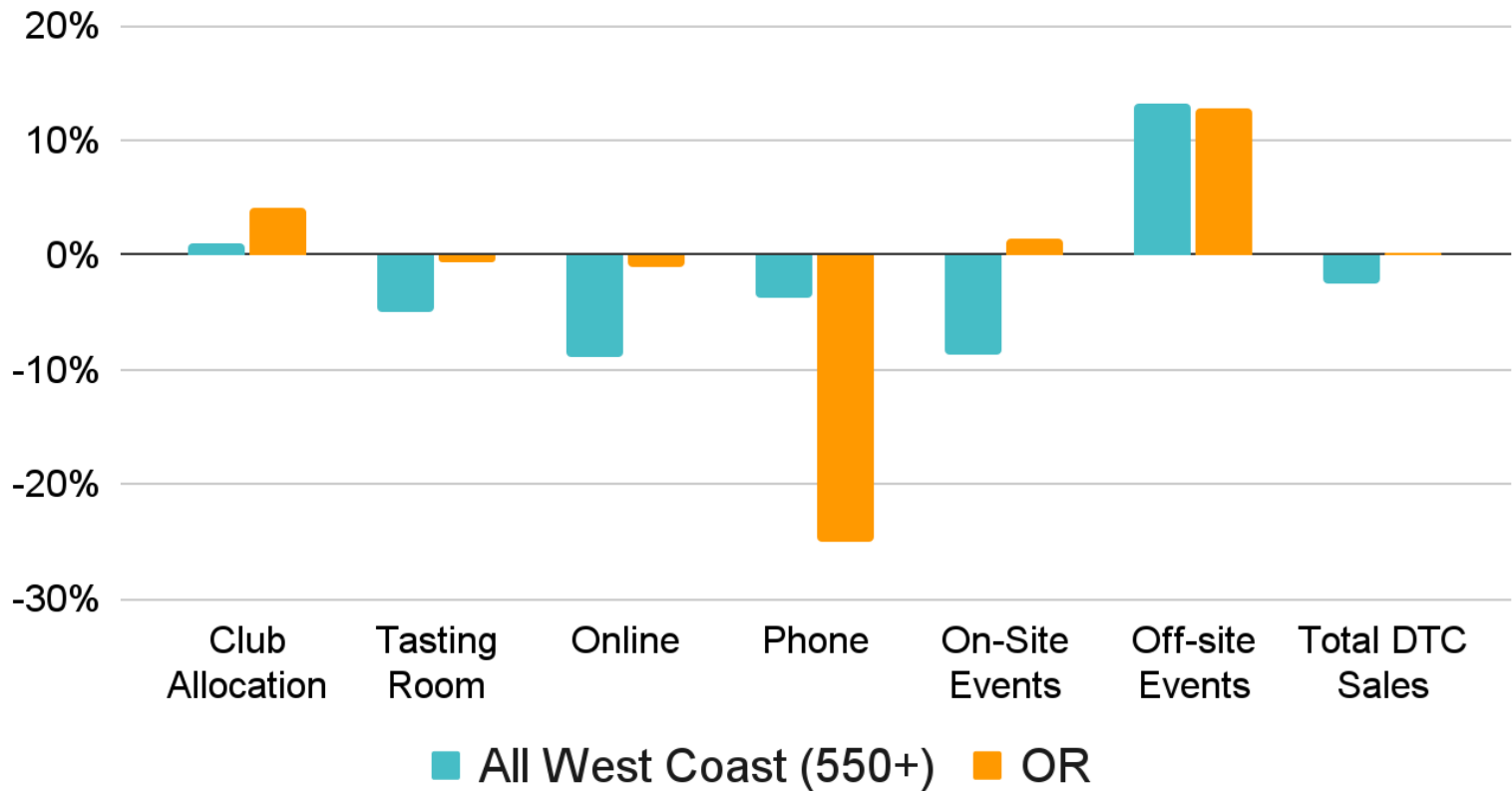
2024 Total Percent Change by Tasting Room Metric vs. 2023

	Central CA	Central Coast	Napa	Sonoma	OR	WA
Total Tasting Room Revenue	-2.5%	-4.3%	-5.6%	-9.1%	-0.6%	-3.7%
Visitor Count	-4.9%	-4.9%	-5.4%	-10.1%	-3.4%	-12.8%
Purchase Conversion Rate	2.3%	-4.3%	-3.4%	2.0%	-1.4%	5.8%
Average Order Value	0.2%	6.3%	3.3%	-0.9%	4.4%	4.2%
Revenue per Visitor	2.5%	2.5%	-0.2%	1.1%	2.5%	10.4%

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Is the Tail Wagging the Dog?

WISE Triple Score -

i.   Mystery shopping data – 2024 Averages:

- Asking for the **Sale** = 86%

- Presenting the **Wine Club** = 32%

- Contact **Data** Capture = 18%

ii.   DATA COLLECTION - Every taster, every time!

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How can we generate more revenue beyond the tasting room and limited traffic?

📞 Phone campaigns
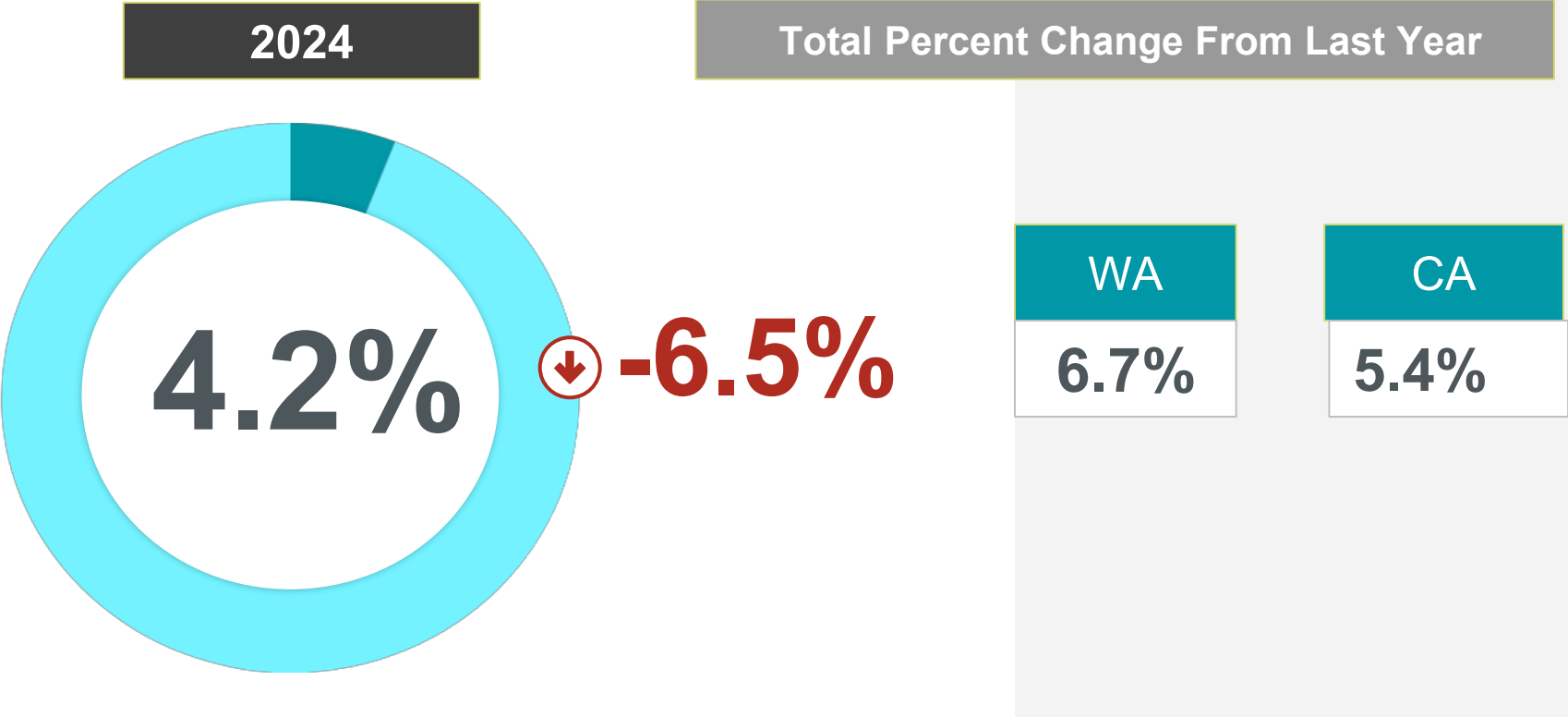
💬 Texting

✉️ Email

🚐 Roadshow Events

= $

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Declining wine club sizes are a concern – though the impact on sales is being offset to some extent by rising revenue per member.

2024 Total Percent Change by Wine Club Metric vs. 2023

	Central CA	Central Coast	Napa	Sonoma	OR	WA
Total Club Revenue	-3.1%	-1.2%	2.6%	-3.9%	1.9%	-1.3%
Allocation Revenue	-3.7%	1.3%	2.6%	-3.8%	2.6%	-1.9%
Beyond Allocation Revenue	-2.0%	-6.0%	2.5%	-4.5%	2.5%	0.3%
Change in Active Members	-5.6%	-1.3%	-3.1%	-5.9%	-0.3%	-2.4%
Revenue per Member	2.7%	0.1%	5.8%	2.1%	2.2%	1.1%

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Decline In Club Members Attributable to Lower Acquisition Rates As Opposed To Rising Attrition Rates

2024 Percent Change of Club Member Acquisition & Retention vs. 2023
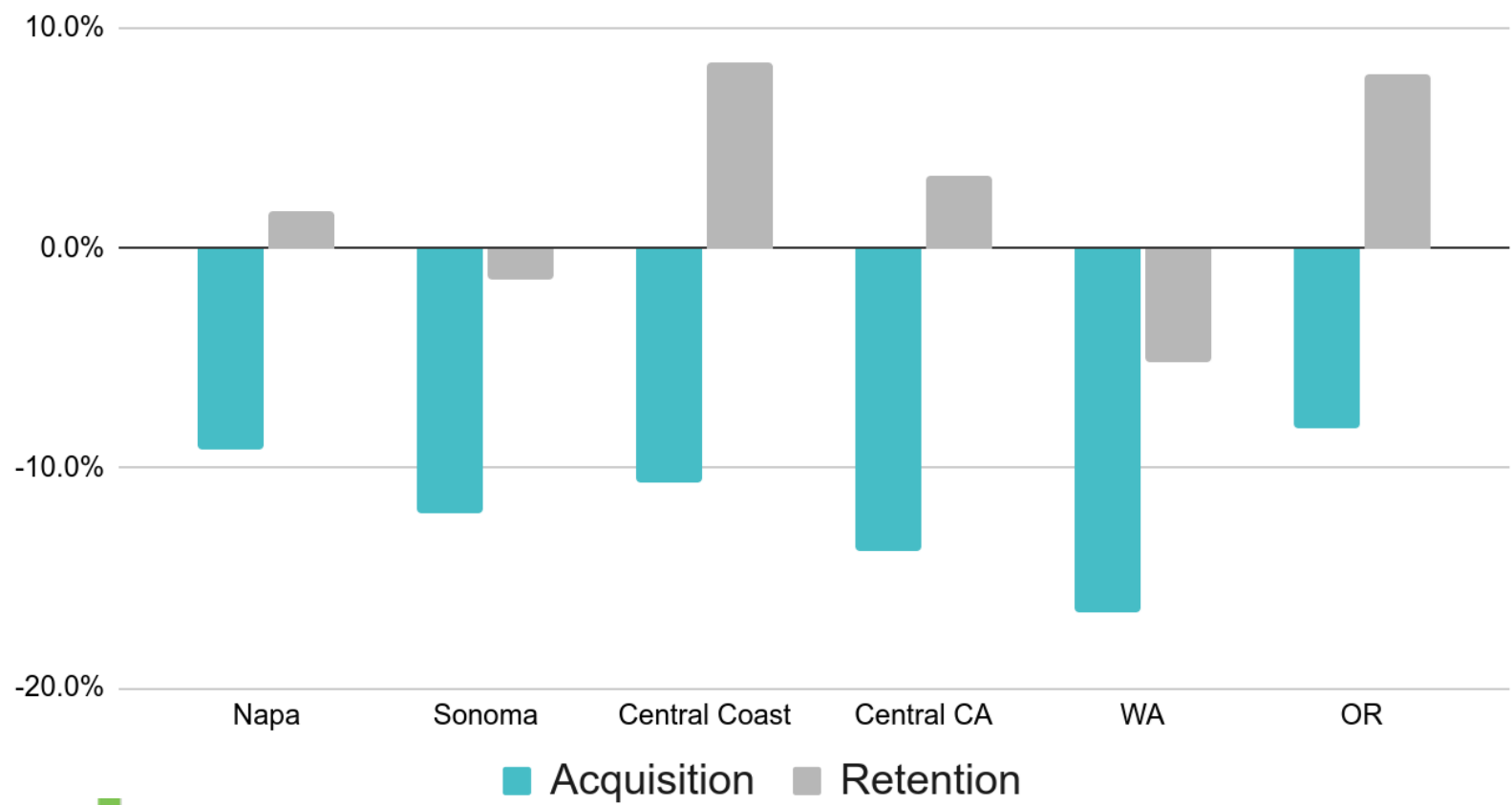
How can we increase acquisition:

a. **In the tasting room? (Turning Transactions into Relationships)**

   ➢ Qualified Traffic - the right people visiting?
   ➢ Sales Training - asking the right questions
   ➢ Focus on Benefits
      (the right benefits and emotionally connect)

b. **Beyond the tasting room and limited traffic?**
   ➢ Roadshows
   ➢ Digital Campaigns (for new & Alumni)
   ➢ Referral Programs - Club Shares, Strategic Partnerships, Beyond
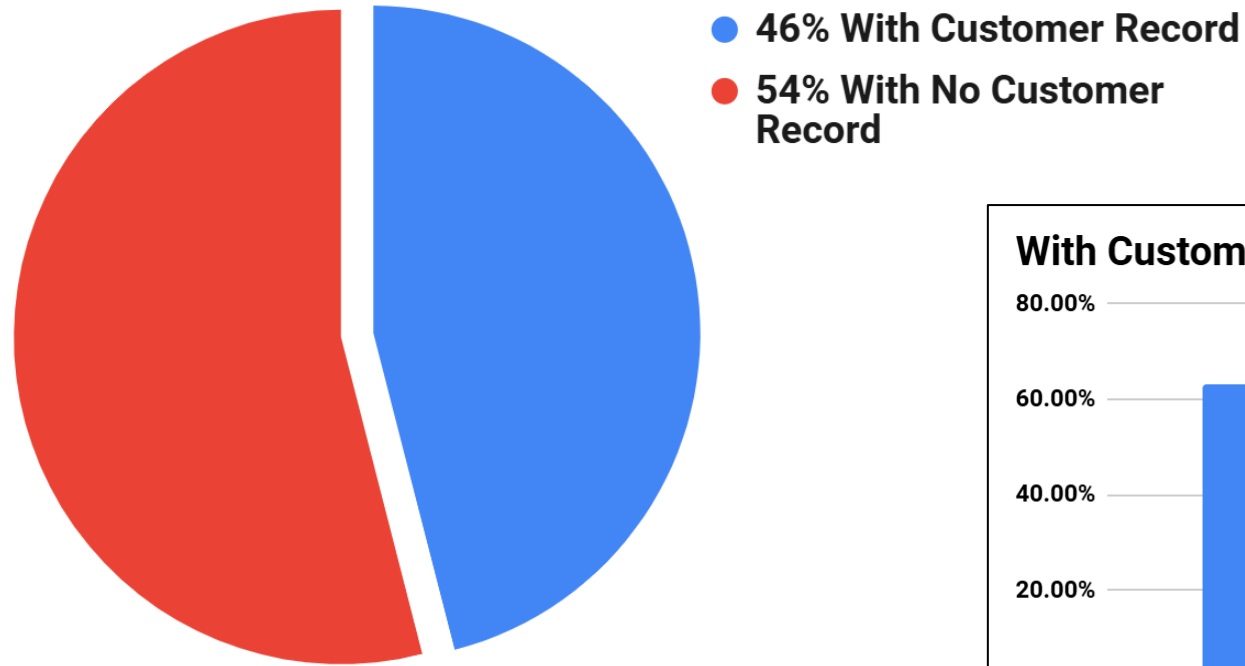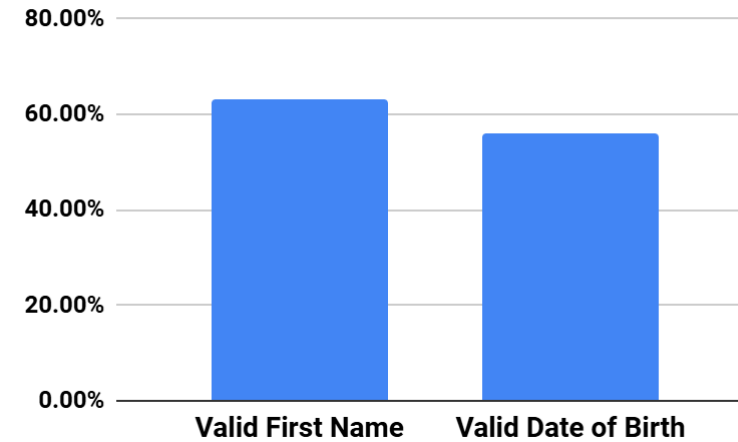   Traditional/Outside the Box Thinking, Data Mining…

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Collecting Customer Data at the Tasting Room

- 46% With Customer Record
- 54% With No Customer Record
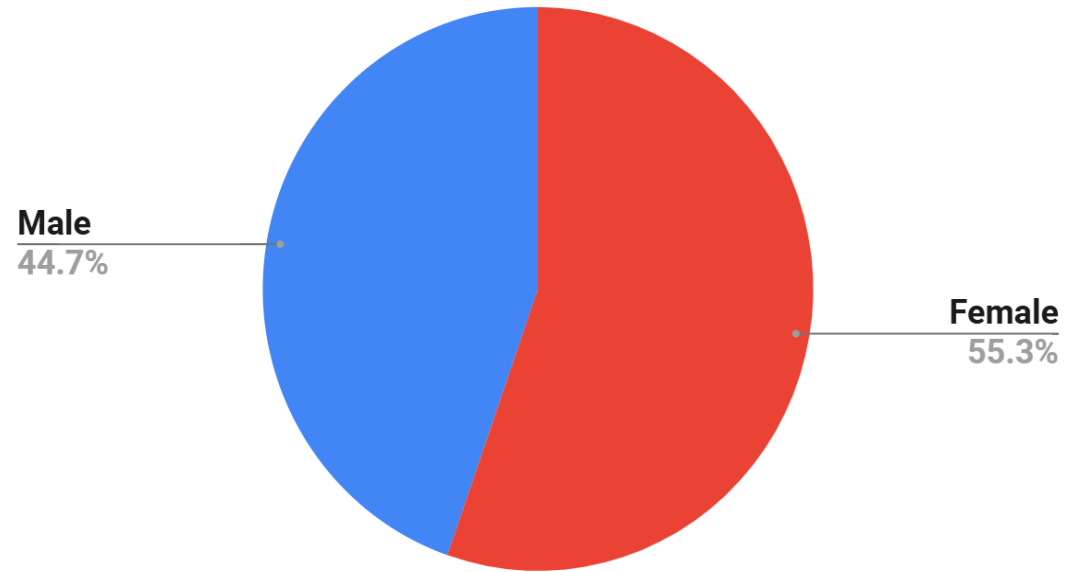
With Customer Record- Names & DOBs

Valid First Name | Valid Date of Birth

Data Collection needs to be improved
Segmentation for Marketing Campaigns is impossible without data collection.

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% of Total Tasters 2024

Male 44.7%
Female 55.3%

Total Sales- Male and Female

Sales - Female 34.1%
Sales - Male 65.9%
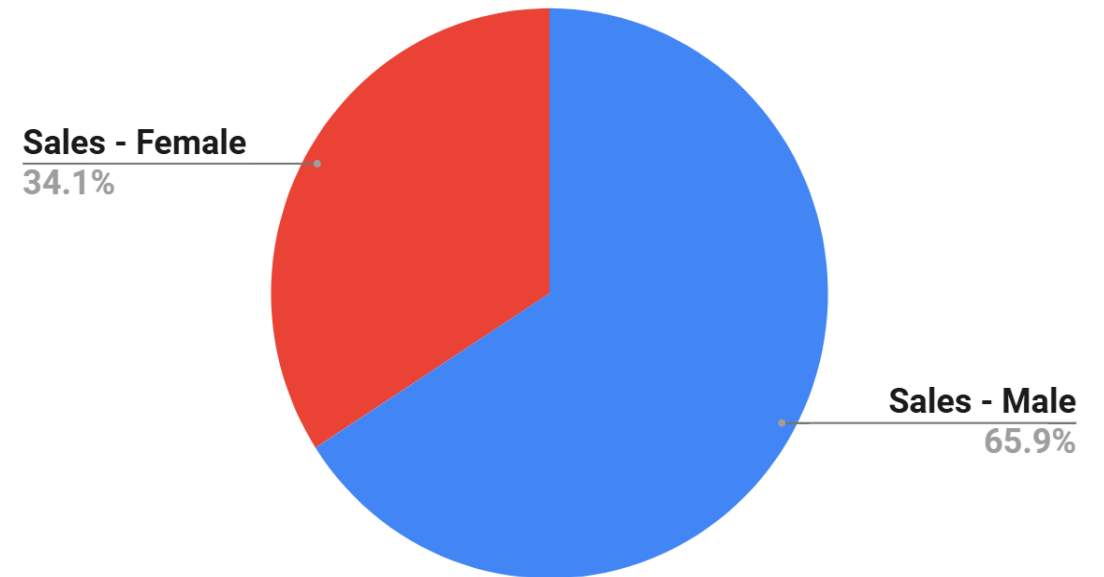
Tasters & Sales by Gender

44% of tasters are male, 55% of tasters are female
Male AOV: $420, Female AOV: $264

Region	% of DTC Sales 2024	% of Tasters 2024	AOV 2024	% of Signups 2024
Portland Region	30.50%	79.4%	$287	34.7%
OR	6.40%	6.6%	$325	8.2%
TX	5.60%	1.1%	$518	5.0%
Seattle Region	5.40%	2.5%	$413	5.7%
FL	4.60%	0.6%	$497	3.9%
Southern California	4.50%	0.9%	$494	3.5%
IL	2.90%	0.5%	$406	2.2%
NY	2.80%	0.4%	$548	1.6%
CA Bay Area	2.20%	0.6%	$514	1.5%

Regional Analysis
Locals visit frequently, spend little and don't sign up for the club. Tasters from far away spend more money.

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Generation	% of DTC Sales 2024	% of Tasters 2024	AOV 2024	% of Total Signups 2024
Gen X	40%	34%	$412	40%
Boomers	36%	31%	$432	31%
Millennials	21%	31%	$330	26%
Gen Z	1%	3%	$211	2%
Silent Generation	2%	1%	$396	1%

Generational Analysis
Boomers spend more than Gen X but Gen X signs up for the club more frequently.

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Key Takeaways

- Improve the WISE Triple Score in the tasting room (Wine, Club & Data).
- Mine data to decrease dependency on tasting room.
- Locals visit often but spend less, sign-up less.
- Travelers spend more.
- Gen X spends less initially but signs up more.
- Boomers spend more but sign up less.

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Opportunities

- Consider wine club benefits for beyond PNW (for those other 50%).
- Special Club Events to Sign-up Locals.
- Roadshow Events in Targeted Top Areas.
- Collect More ACTIONABLE Customer Data.
- Use Mined Data for Post-Tasting-Room-Visit Sales
- Staff Training and Engage the Team in the Bigger Picture

QUESTIONS & IDEAS