



Annual Direct to Consumer Survey

Each year Silicon Valley Bank provides the wine industry metrics, status and trends on Direct to Consumer ("DtC") sales. All respondents who fully complete the survey will receive complementary survey results, including anonymized detailed responses, summary analysis, and more than 50 charts which can be used by wineries to benchmark their own performance. We scrub out incomplete surveys and those surveys that don't meet minimum expected levels of accuracy. For those completing the survey, we anticipate the information will be compiled and returned to participants just prior to our videocast in May.

1 What is your annual case production (in 9L equivalents)?

Annual case production

2 What was the average suggested **retail** price, per 750ml bottle, of your wines in 2020?

Average retail price in \$

\$

3 How many years have you been selling wine commercially?

of years

4 From which region do you primarily produce your wine?

Napa County, CA
(including Napa Carneros)

Northern Oregon (including Willamette Valley)

Southern Oregon

Washington

Canada

Santa Cruz, Monterey, Santa Clara, and San Benito Counties, CA

Paso Robles AVA

Livermore, CA

Solano, Yolo, & Contra Costa Counties, CA

Lake County, CA

Lodi/Clarksburg, CA

Northern Central Valley, CA
(Sacramento, Merced, & Stanislaus Counties)

New York

Sonoma County, CA
(including Sonoma Carneros)

Santa Barbara, CA

Virginia

Mendocino County, CA
(including Anderson Valley)

San Luis Obispo County, CA

Sierra Foothills, CA
(Amador, Calaveras, El Dorado, Nevada, & Placer Counties)

Marin County, CA

Southern California (San Diego, Temecula, & Los Angeles Counties)

Southern Central Valley, CA
(Fresno, Kings, Kern, Tulare, & Madera Counties)

Texas

Other countries, states and regions not listed
(Please specify)

5 Do you have a tasting room?

Yes. What year did it open?

No (if no, skip to question 13)

6 Where is your tasting room(s) located?

(Please choose all that apply.)

Winery/vineyard

Urban area

Both

7 Is your **primary** tasting room:

Open to the public

Appointment only

Both

8 Estimate the total number of individual visitors to your tasting room(s) in 2020.

Total # of visitors in 2020

9 Estimate the average tasting room purchase in dollars for 2020.

(Total tasting room sales divided by the number of individual sales receipts. Wine sales only.)

Average taste room purchase in \$

10 How much do you charge for your standard and reserve tasting fees?

(If a fee is not charged, enter "n/a".)

Standard tasting

Reserve tasting

11 What is your reimbursement policy for in person tasting fee at the winery?

(Please answer all that apply.)

Spend at least

Purchase at least

Part of club membership package

Other

We don't reimburse

12 What incentive compensation programs do you offer your tasting room sales staff?

(Please select all that apply.)

Sales commission for wine sales

Period end bonus paid for exceeding goals

Team based payout for exceeding goals

Payment for new club member signups

Residuals paid for club retention

Tips and gratuities

None

Other, please specify

13 Did your winery engage in virtual wine tastings in 2020?

(Please choose the answer that fits best.)

- Yes, we produced more than one tasting a week once we got going
- Yes, we produced about one tasting a week once we got going
- Yes, we produced one or more tastings a month, but less than one a week, once we got going
- Yes, but fewer than one tasting a month
- No (if no, skip to question 16)

14 How much do you charge for your virtual tasting fees?

(If a fee is not charged, enter "n/a".)

Virtual tasting

15 What is your pricing and discount structure for virtual tastings?

(Please select all that apply.)

- Same tasting fees as in-person tastings
- We charged less for virtual tastings
- We charged for the wine upfront and discounted based on additional purchases
- Same tasting fee reimbursement policy for in-person visits
- Shipping discounts included
- Other, please specify

16 Do you have any of the following?

(Please select all that apply.)

- Wine club
- Allocated mailing list
- Subscription model (e.g. flat periodic billing for wine selections)
- None (if none, skip to question 23)

17 What is the average compensation (in dollars) awarded to employees per wine club sign ups?

18 How many **active** club/allocated mailing list members did you:
(Please enter # in all three boxes.)

Have at the beginning of 2020?

Acquire throughout 2020?

(New sign-ups only — not a net figure.)

Lose during 2020?

(Include members who put membership on hold.)

19 How many months do club/allocation members stay in your most popular wine club release/ mailing list program on average?

of average months in most popular club

20 Estimate the average per person annual sales for wine club members.

(Total sales dollars to the club, divided by the number of members for which wine was shipped.)

Wine club shipment(s)

Additional purchase(s)

21 Please complete the following for your most popular wine club in 2020:
 Example: "2" shipments per year, containing "6" bottles per shipment

of shipments per year

of bottles per shipment

22 What is the average percentage discount offered to club members?
 (Please estimate overall discount; please enter whole numbers i.e. 32; **not** 32% or 0.32.)

Average % discount %

23 What shipping options do you offer your club members?
 (Please select all that apply.)

Free shipping on all club shipments

Discounted shipping on club shipment

Free or discounted shipping on all additional purchases

Free or discounted shipping on orders over \$

Other

None

24 What is the breakdown of your sales channels in 2020 (total must equal 100%)?
 (Please enter whole numbers i.e. 32; **not** 32% or 0.32.)

Wholesale on-premise %

Wholesale off-premise %

Visitor center/tasting room %

Wine club %

Allocated members %

Subscription sales %

Onsite events %

Offsite events %

Telesales %

Internet and web %

Virtual tastings %

Other, please list %

100%

25 What was the annual percentage change in Direct to Consumer sales in 2020 compared to 2019?
 (e.g. 8% higher in cases sold, and -2% lower in dollars sold. Enter whole numbers i.e. 32; **not** 32% or 0.32.)

% change in # of cases sold %

% change in dollars %

26 What digital resources do you use extensively?

(Please select all that apply.)

- Social media
- Active e-commerce
- Online marketing tools (SEM, retargeting, SEO, driving sales to web, banner ads, etc.)
- SMS messaging (text)
- Digital marketer (In-house or outside consultant)
- Data analyst
- Platform analytics (i.e. Google Analytics)
- Other, please specify

27 How much do you spend annually, as a percentage of total sales, on digital marketing?

(Please enter "n/a" if you don't know.)

Social media marketing	<input type="text"/>	%
Search engine marketing	<input type="text"/>	%

28 In a perfect world, businesses will know that \$1.00 of direct marketing investment will generate a known return. For example, \$1.00 spend will produce \$1.18 in additional sales. With that as context, can you report what \$1.00 of **digital marketing spend** will produce for your winery in added sales?

(Please enter "n/a" if you don't know.)

Every \$1.00 of digital marketing spend will produce \$ in additional sales

29 How many active email addresses do you have on your email list?

of active email addresses

30 Do you remove inactive emails from your email list annually or more often?

- Yes
- No
- I am not sure

31 How frequently do you interact with winery clients by sending general or targeted email blasts through your mailing list?

- Daily (targeted)
- Weekly
- Bi-weekly
- Monthly
- Quarterly
- Less often than quarterly
- I am not sure

32 If you use email, what are your average email open and click rates?

(Please enter whole numbers i.e. 32; not 32% or 0.32. Please enter "n/a" if you don't know.)

Open rate %

Click rate %

33 How do you intend to invest and improve your digital marketing efforts in 2021?

(Please select all that apply.)

Hire employees dedicated to digital marketing

Engage outside consulting firm

Upgrade systems

Increase marketing budget

Other, please specify

34 How many new club memberships were you able to generate exclusively through digital channels in 2020 (i.e. virtual tasting, digital, etc.)?

of memberships

35 What is your digital Customer Acquisition Cost (CAC)?

(Please enter "n/a" if you don't know.)

Digital CAC per customer \$