



DIRECT TO CONSUMER
WINE SYMPOSIUM
FREE THE GRAPES

Beyond the Tasting Room

How In-Market Events are
Changing the DTC Landscape

Panelists



Carla Jeffries
Blue Rock Vineyards



Meghan Delzell
Sangiacomo Family Winery



Sherrie Perkovich
Sojourn Cellars

Carla Jefferies



General Manager
Blue Rock Vineyards

Location: Alexander Valley, Sonoma County, CA

Production: 20,000 cases
(20% DTC; 80% Wholesale)

Types of Events: corporate, wine dinners, in-store tastings, country club tastings, charity events, in-home tastings

Number of Events in 2025: 110

Meghan Delzell



Director of Sales & Marketing
Sangiaco Family Wines

Location: Sonoma, CA

Production: 5,000 cases
(80% DTC; 20% Wholesale)

Types of Events: charity wine auctions, sponsorships, food & wine festivals, wine dinners, country club and hotel partnerships.

Number of Events in 2025: 95

Sherrie Perkovich



Head of Marketing & Consumer Experiences
Sojourn Cellars

Location: Sonoma, CA

Production: 10,000 cases
(85% DTC; 15% Wholesale)

Types of Events: inhome tastings, festivals, wine dinners and wine auctions

Number of Events in 2025: 100

Trends

Mobile Wine Tourism

- The further away from Sonoma/Napa, the bigger our success
- Secondary and tertiary markets

Private Tastings

- Seated, reception style & dinners at social clubs, country clubs and private homes
- Pop up locations
- Residency for 1-6 months

Datamining

- Hot spot clusters
- Personalization
- Utilizing technology

Collaboration with Like Brands

- Story engagement (vs. telling)

Evolution of In - Market Strategy

Brand Launch (2018) → Travel-Driven DTC

Where We Started

- Charity auctions
- Small collaborative tasting events

Why We Leaned In

- Meet our best customers where they already gather
- Extend the tasting room beyond Sonoma
- Build relationships, not onenight sales

How It Evolved

- Selective with auctions and large festival events
- Strategic sponsorships
- Collaboration with likeminded brands
- Focusing on B & C markets with high engagement

*“This wasn’t accidental
— it was intentional.”*

Charity Auction Visibility & Collaboration

How We Design High-Impact Auction Lots: Break through the barrier into Live Auctions.

MINIMUM Lot Value: \$5K- \$10K

- Built value through collaboration (partner wineries, hosts, chefs, brands, venues)
- Designed for emotional bidding + future engagement
- Not one-size-fits-all

Two Redemption Paths We Use

In-Market Experiences

- Private dinners
- Hosted tastings
- Partner venues or homes
- Keeps the relationship local and active

Wine Country Visits

- Vineyard experiences
- Estate visits/overnight
- Golf or activities
- Wine Country events

Why This Matters

- Redemption is the *start* of the relationship, not the finish line
- Behind-the-scenes access
- Leadership and owners involved
- Deepens brand immersion and loyalty
 - **Builds New Ambassadors**

What does it look like?



Sponsorships: Going Where No Wine Has Gone Before

How It Started

- In-kind trade for visibility
- Prioritized wine as hospitality, for opportunity into product pitch and exposure
- Testing a non-traditional audience

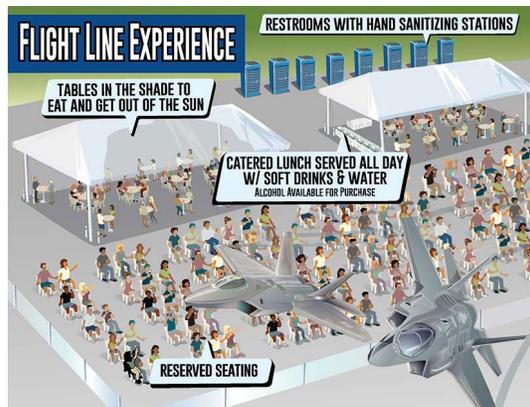
How It Evolved

- Measurable engagement & brand lift
- Transition from trade to paid sponsorships
- **Entering 2026 with negotiating power**
- Integrated storytelling + DTC capture

Why It Works

- Passion-driven audiences
- High emotional energy
- Less noise than traditional wine events (Competing with beer & RTDs)

Sometimes growth requires getting out of the box — and out of the wine world.



Portable Brand Storytelling

What We Bring to Every Table (The Sangiacomo Style)

- Bright, welcoming color palette
- Historical family photography
- Farming-first storytelling materials
- Tactile, layered brand elements
- Sign-up cards
- Order forms AND a visual callout to Invite the Sale

How It Scales

- 6–8 ft tables → immersive tabletop experience
- Larger events → banners, backdrops & visual anchors



What does it look like?



From Experimentation... to Measured Growth

What We Tested

- In-kind sponsorships
- Non-traditional audiences
- Wine as hospitality
'Elevated'

What We Learned

- Passion and visibility drives engagement
- Context matters more than category
- Measurement unlocks both
 - ➔ investment and revenue potential

What We Built

- Revenue-generating sponsorship models
- Scalable, repeatable activations
- Awareness and demand

Metrics Measured ➔ Results

- Event Tasters (Exposure)
- Mailing List Acquisition
- Sale Acquisition +Club!
- New visits to TR
- Conversion to sale
- Conversion to club
- Measure the 'Tail'
- LTV of Auction Winners

The Trade - Offs

The Upside

- Meet customers where they already are
- Strengthen relationships outside the tasting room
- Expand reach beyond winery foot traffic
- Build brand loyalty through shared experiences

The Reality

- Travel, shipping & staffing costs
- Time away from the winery
- Logistical and compliance complexity
- ROI is often longterm, not immediate

*In-market events aren't cheaper
– they're more intentional.*

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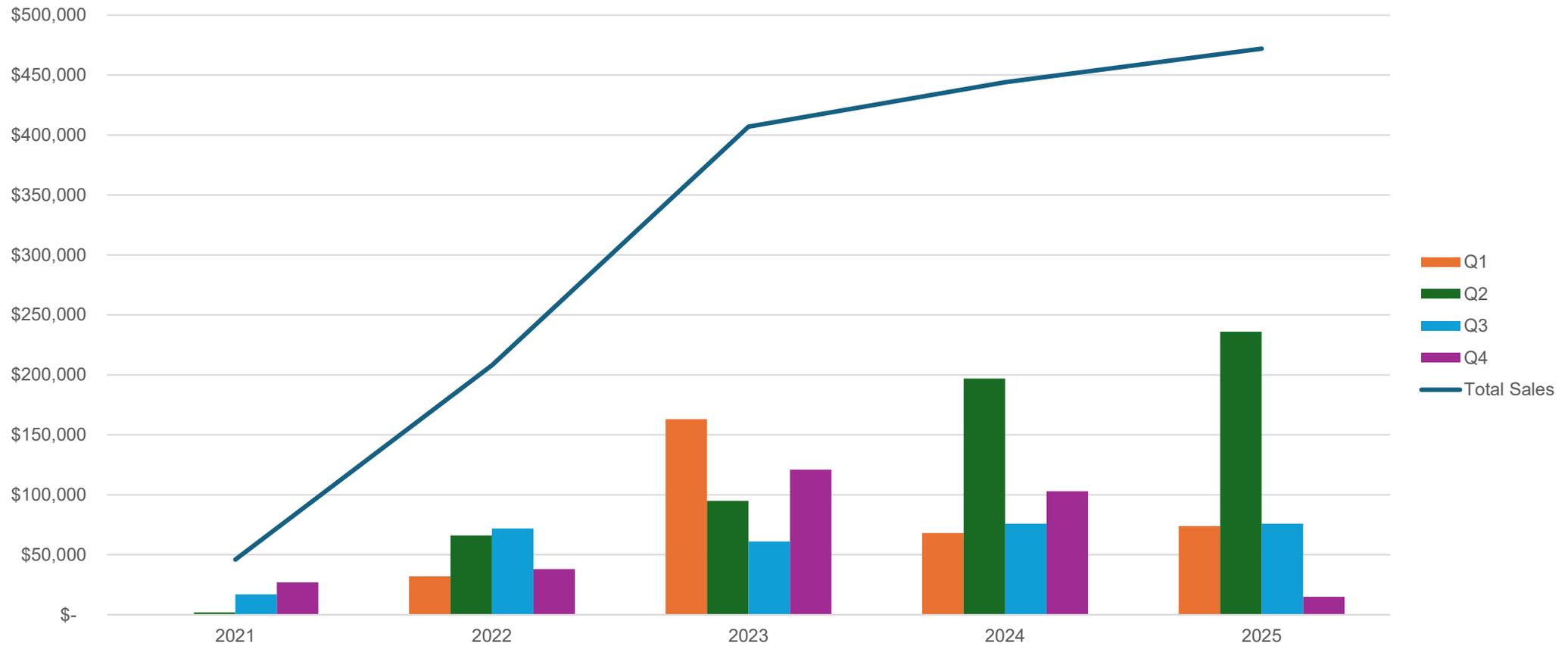
In Home Tastings

- Birds of a feather
- Opportunity to meet new customers
- Some customers are just in person purchasers
- Expectations set upfront– wine buying opportunity
- Do your homework in advance
- Ask for the sale
- Need the right staff
- Set sales goals and track expenses

Large public events

- Location
- Format
- Length of time of tasting
- Price of the ticket to attend
- How the event is promoted
- Presence of other customers to organize private tastings (mitigate risk)
- Ask for the sale

By the Numbers



Success Measurements

Metrics

- Sales at the event
- Leads
- Sales from event follow up
- Sales compared to set goals
- Total costs vs. set goals
- LTV

Keys to Success

- Ask for sale
- Ask for the opt in
- Right staff
- Follow up / ongoing dialog
- Customer service
- Booking multiple events in the same area
- Setting expectations
- Taking direct orders

The Trade - Offs

The Upside

- Sales/revenue generator
- New customer acquisition
- Growth in targeted geographies
- High value/experiential events
- Builds loyalty with members
- Highly targeted

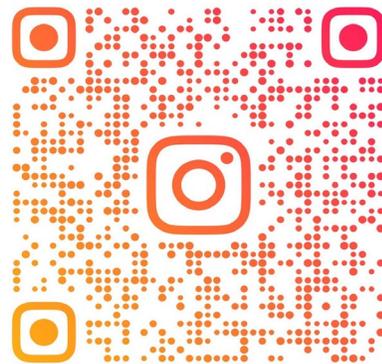
The Reality

- Time out of office for staff
- Costs can escalate if not managed properly
- One and done if not followed up with properly
- Resource heavy

Blue Rock Vineyard

Why we started

- DTC program is relatively new
- Drive tasting room visitation
 - 4 years road work has been # 1 source of visitation
- More club members signed up on the road last 2 years
- Don't wait for people to come to you
- Build your brand & meet new customers
- Combine Wholesale with DTC events
 - Builds synergy
 - Brand pull through



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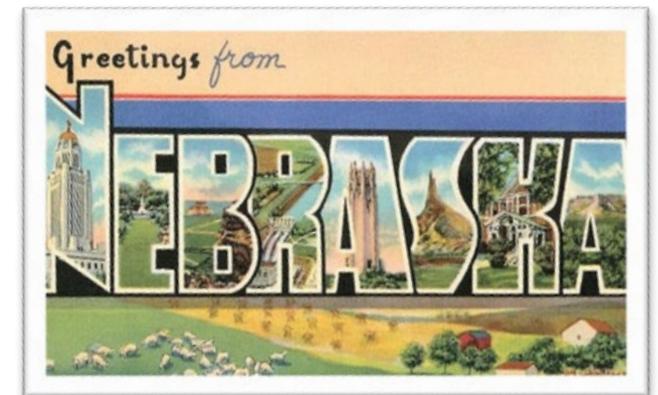
What has worked

Try the road less traveled

- States often overlooked or smaller towns outside larger hubs

We do what is expected, but we also try or create unique events

- Corporate, business meetings, clubs– not just wine focused



From Start to Finish

Datamining and Cluster Analysis

Use technology

- Mapping programs like Google and Batch Geo to layer
- LinkedIn, People Finder, Zillow

Vetting starts in the tasting room

- Train staff & follow up with opportunities



Planning and Promotion

Build a calendar up to 2 years out

- Target markets & events with timing

Reach out to interested parties

- Keep a running list of club members and target events

Follow up is crucial

Ongoing Engagement

Set expectations in advance

- Create invitation templates

Build excitement

- Send a personalized video or note to guests
- If public, send information to local mailing list and post to socials

Success Metrics

Immediate ROI

- Know the \$ needed to travel and sales needed
- Use sales data, QR codes and video to track
- Know & set your marketing expectations

Follow up!

- Thank you notes to all attendees
- Host gifts
- Contact with ongoing offers

Set your brand apart from others

- Know your hosts and locations
- Ask questions
- Expect the unexpected



The Trade - Offs

Better Brand Building with Amazing Experiences

- Nothing more intimate and personal than being invited into someone's home and meeting their friends & vice versa for them

Bandwidth

- Takes a lot of planning and engagement and interaction
- The 'sale' is just the first step

Things can go wrong - plan for contingencies - it's travel and people

- Delays, illness, costs
- Plan for energy requirements & effort to work a market all day, followed by evening events

Top Takeaways

To Begin

- Do your homework in advance
- Be strategic about markets
- Setting goals
- Tracking total cost (including expenses)

Keys to Success

- Set proper goals/expectations
- Ask for sale
- Need the right staff

Building Relationships & Your Brand

- Invite them into the funnel
- Transitional journey
- On-going conversation



Thank You!

Scan to download the event checklist from Sojourn Cellars

