



DIRECT TO CONSUMER
WINE SYMPOSIUM
FREE THE GRAPES

Inside the Top 10%

Exploring the data from 3500
wineries at Commerce7



DIRECT TO CONSUMER
WINE SYMPOSIUM
FREE THE GRAPES

Is the sky falling?



Can we beat it?

Powering 3500 Wineries

Commerce 



Beating the Trend

Spectra Winery Admin Panel

Welcome, Andrea

Inside 1.4 Million Memberships: What's Really Driving Wine Club Success

Wine clubs remain one of the biggest drivers of DTC revenue, but not all perform the same. Backed by data from 1.4 million memberships and 17,000+ clubs on Commerce7, this Data Drop reveals the patterns shaping club performance today and the biggest opportunities still on the table.

[Read now](#)

Most Recent Orders

NUMBER	DATE	CUSTOMER	DELIVERY	STATUS	CHANNEL	ITEMS	TOTAL AFTER TIP
3812	Dec 8, 2025 10:31 am	Will Reed 6 Bottle Club	Carryout Tasting Room	No Fulfillment Required	Inbound	4	\$345.00
3811	Dec 8, 2025 10:31 am	Ashley Greyson	Carryout Tasting Room	No Fulfillment Required	Inbound	4	\$46.00
3810	Dec 8, 2025 10:31 am	Jane Doe 6 Bottle Club	Carryout Tasting Room	No Fulfillment Required	Inbound	5	\$0.00
3809	Dec 8, 2025 10:30 am	Frank Williams	Carryout Tasting Room	No Fulfillment Required	Inbound	4	\$46.00
	Dec 8,	John Smith	Carryout		Inbound		





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WINE SYMPOSIUM
FREE THE GRAPES

The Broad Picture

Overall Growth

2.26%

2024 Rate

-1.64%

2025 Rate

0.59%

2 Year
Growth Rate



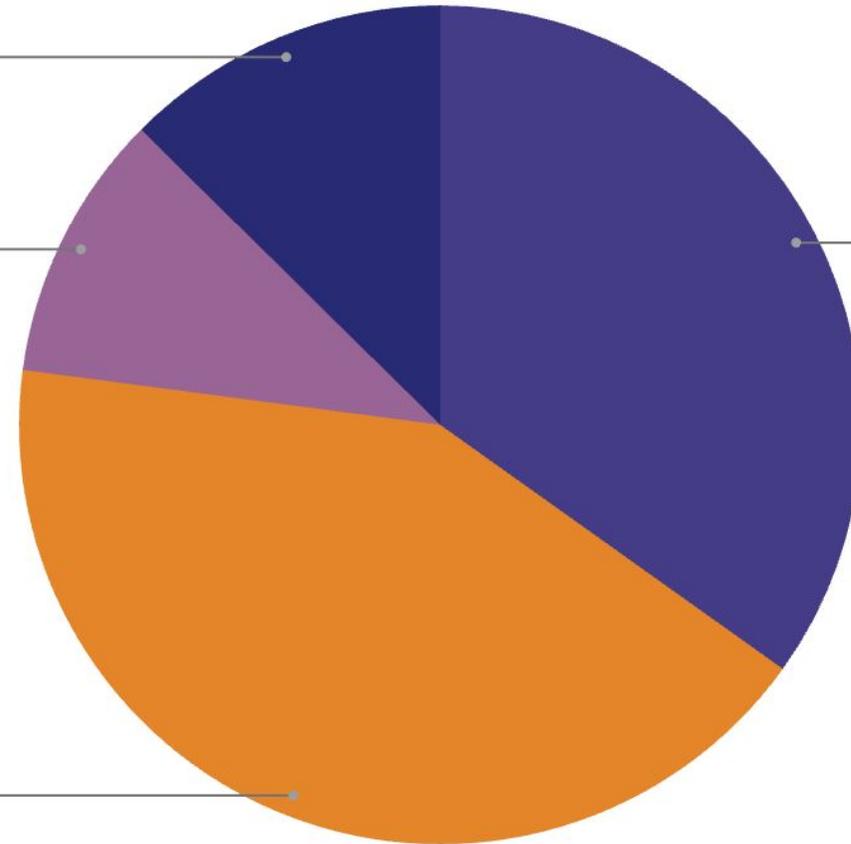
How Wine Is Sold DTC By Dollars

Telesales
12.6%

Web
10.3%

Club
42.2%

POS
34.9%



Average Order Value

	2023	2024	2025
POS	\$104.92	\$100.49	\$97.10
Club	\$235.88	\$249.80	\$256.89
Web	\$237.60	\$232.39	\$224.05
Telesales	\$139.57	\$137.79	\$148.89

Percentage of Sales By Dollars

	2023	2024	2025
POS	31.73%	31.89%	34.88%
Club	41.32%	41.89%	42.21%
Web	10.80%	10.40%	10.33%
Telesales	16.14%	15.82%	12.57%

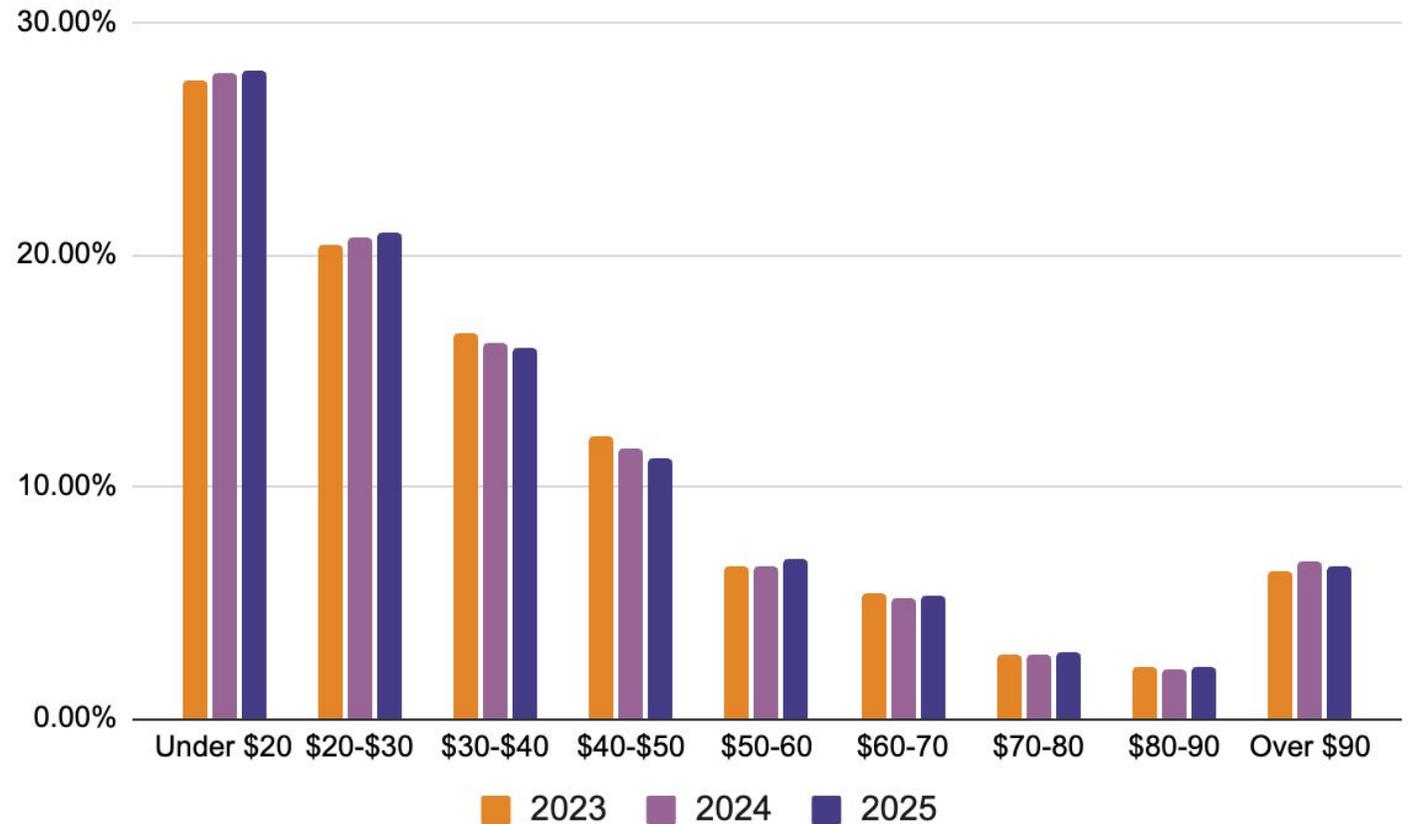
Percentage of Sales By Cases

	2023	2024	2025
POS	31.47%	32.60%	36.22%
Club	40.16%	39.61%	39.51%
Web	9.82%	9.38%	9.78%
Telesales	18.56%	18.42%	14.49%

Compared to Percentage of Sales

	2023	2024	2025
POS	31.73%	31.89%	34.88%
Club	41.32%	41.89%	42.21%
Web	10.80%	10.40%	10.33%
Telesales	16.14%	15.82%	12.57%

Sales By Price Point

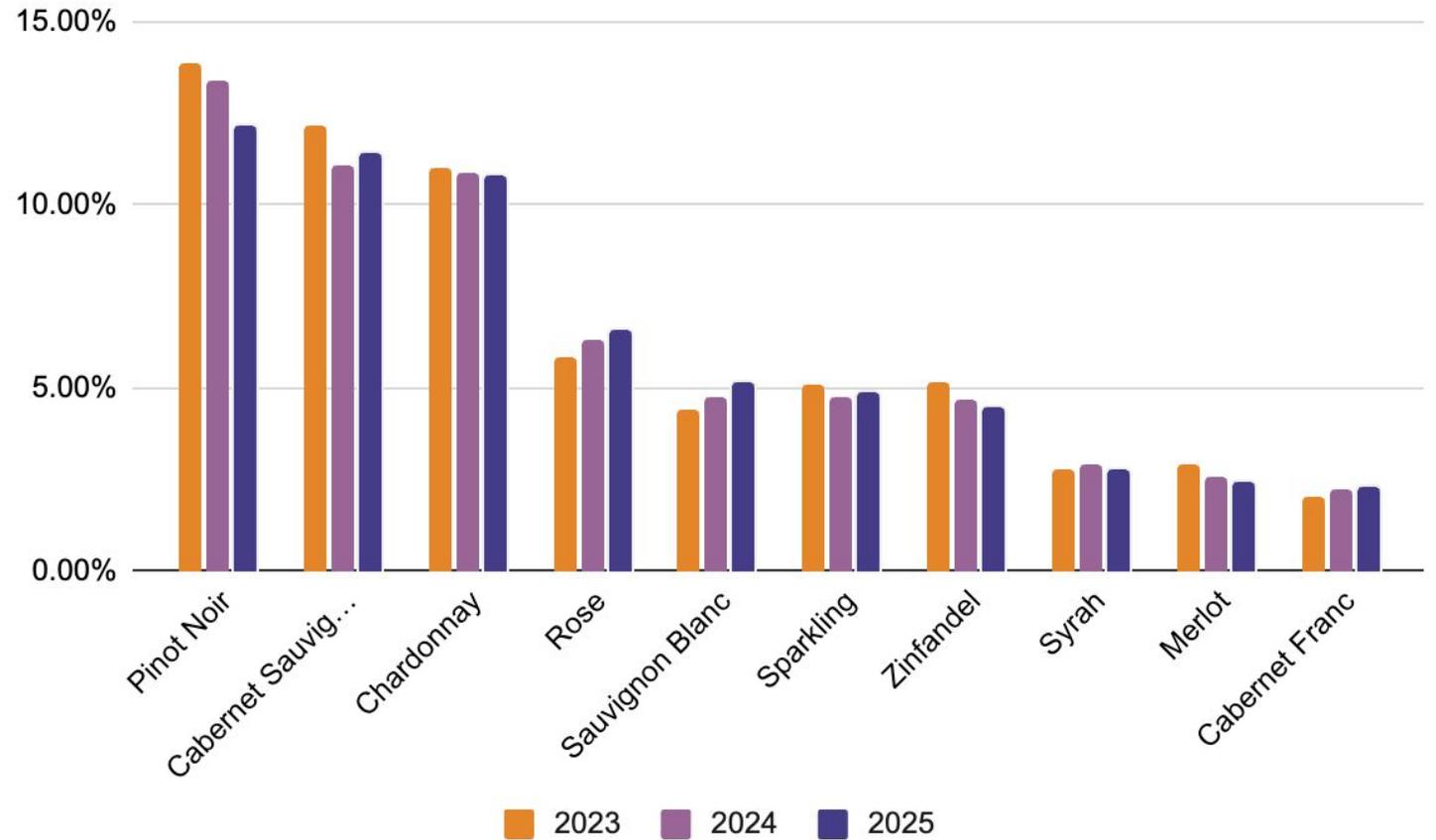


Sales By Price Point

	2023	2024	2025
Under \$20	27.53%	27.87%	27.94%
\$20-\$30	20.41%	20.74%	20.92%
\$30-\$40	16.66%	16.19%	16.02%
\$40-\$50	12.14%	11.69%	11.27%
\$50-60	6.56%	6.58%	6.85%
\$60-70	5.41%	5.22%	5.35%
\$70-80	2.72%	2.75%	2.85%
\$80-90	2.18%	2.13%	2.21%
Over \$90	6.38%	6.82%	6.58%

Sales By Varietal

Top 10 Varietals

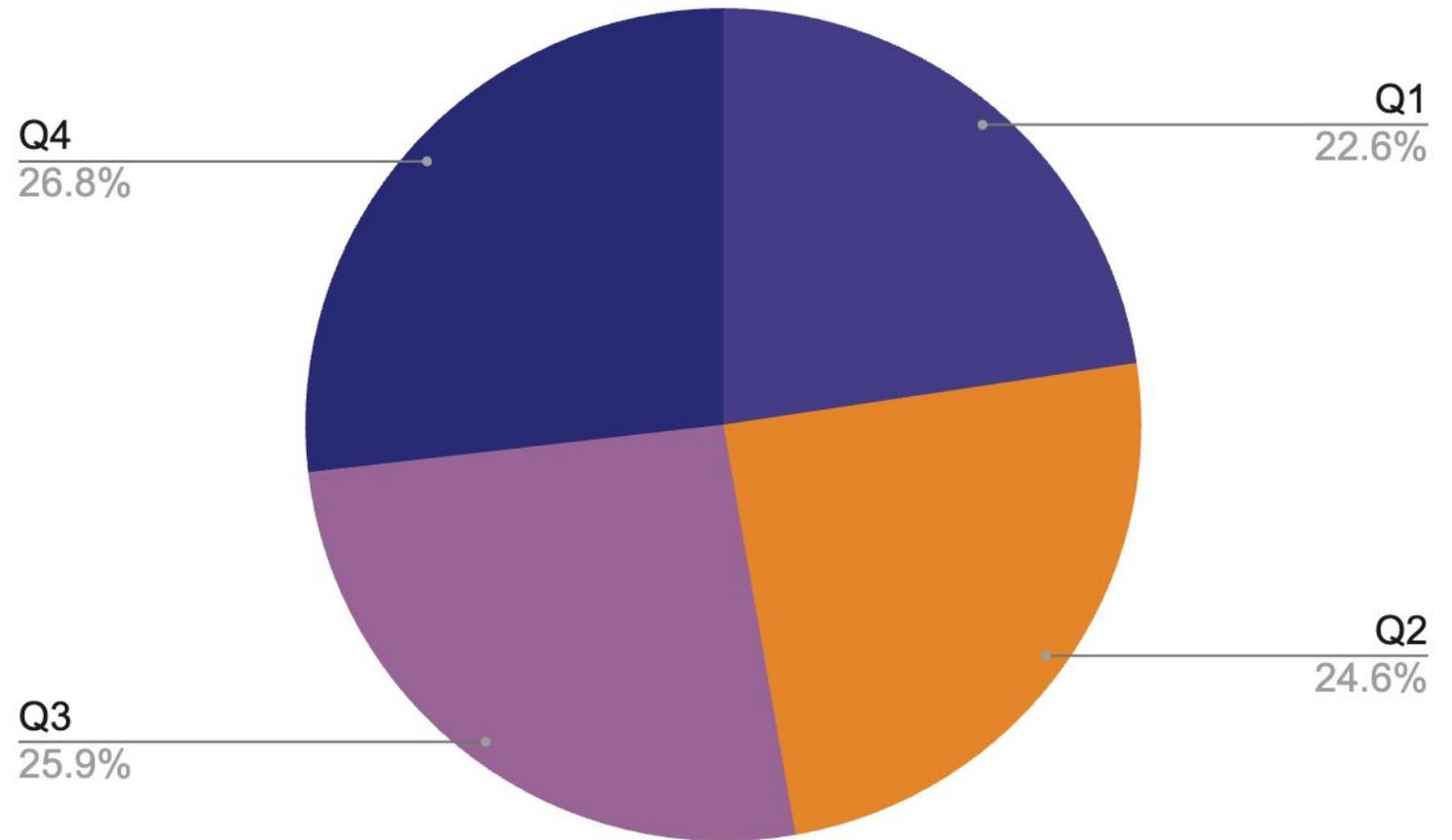


Sales By Varietal

Top 10 Varietals

	2023	2024	2025
Pinot Noir	13.89%	13.43%	12.19%
Cabernet Sauvignon	12.15%	11.11%	11.39%
Chardonnay	11.03%	10.87%	10.84%
Rose	5.81%	6.30%	6.60%
Sauvignon Blanc	4.43%	4.72%	5.16%
Sparkling	5.07%	4.78%	4.91%
Zinfandel	5.18%	4.65%	4.50%
Syrah	2.81%	2.89%	2.80%
Merlot	2.90%	2.57%	2.41%
Cabernet Franc	2.04%	2.26%	2.33%

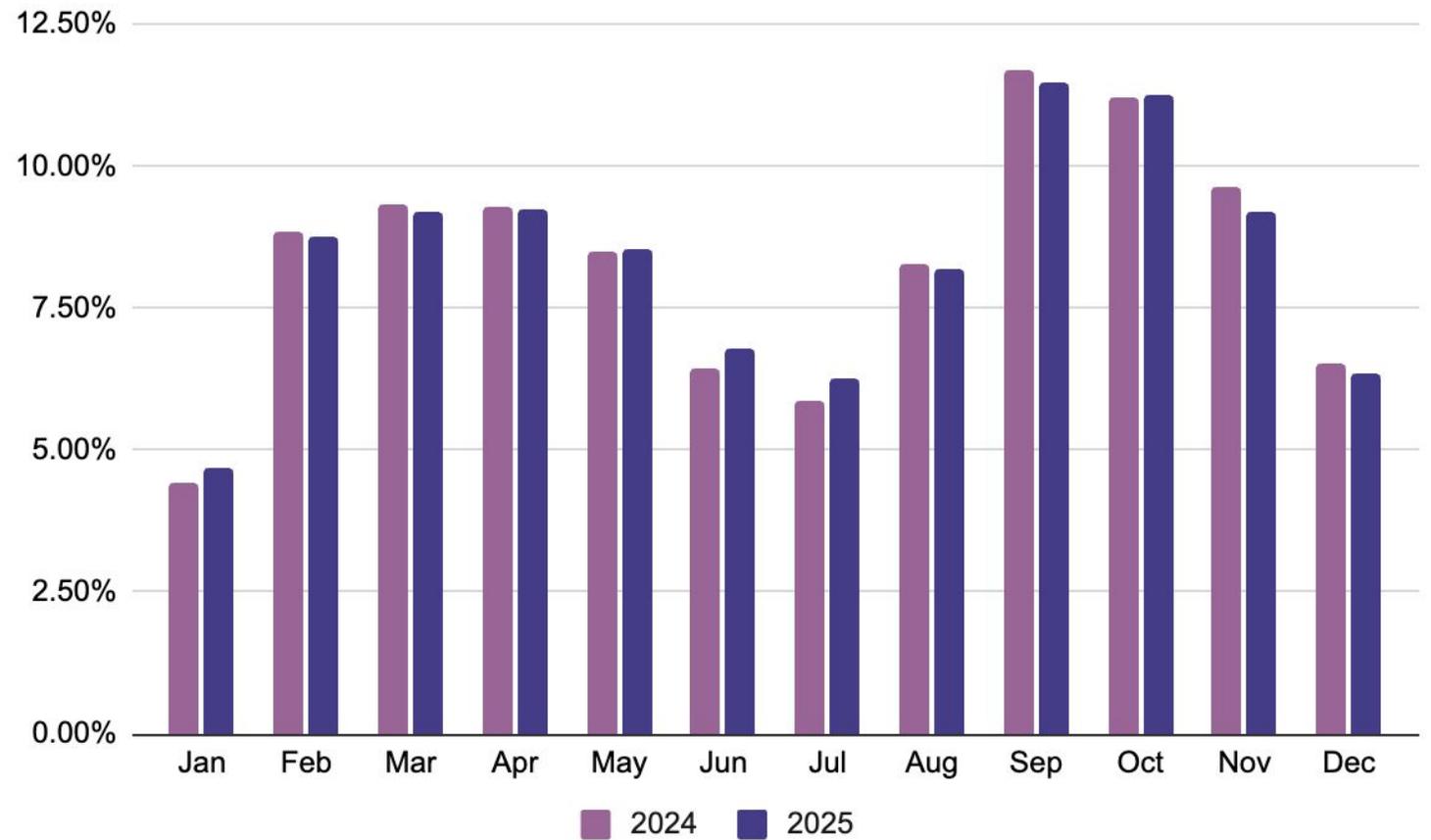
Sales By Quarter



Sales By Quarter

	2024	2025
Q1	22.58%	22.63%
Q2	24.21%	24.61%
Q3	25.84%	25.95%
Q4	27.38%	26.82%

Sales By Month

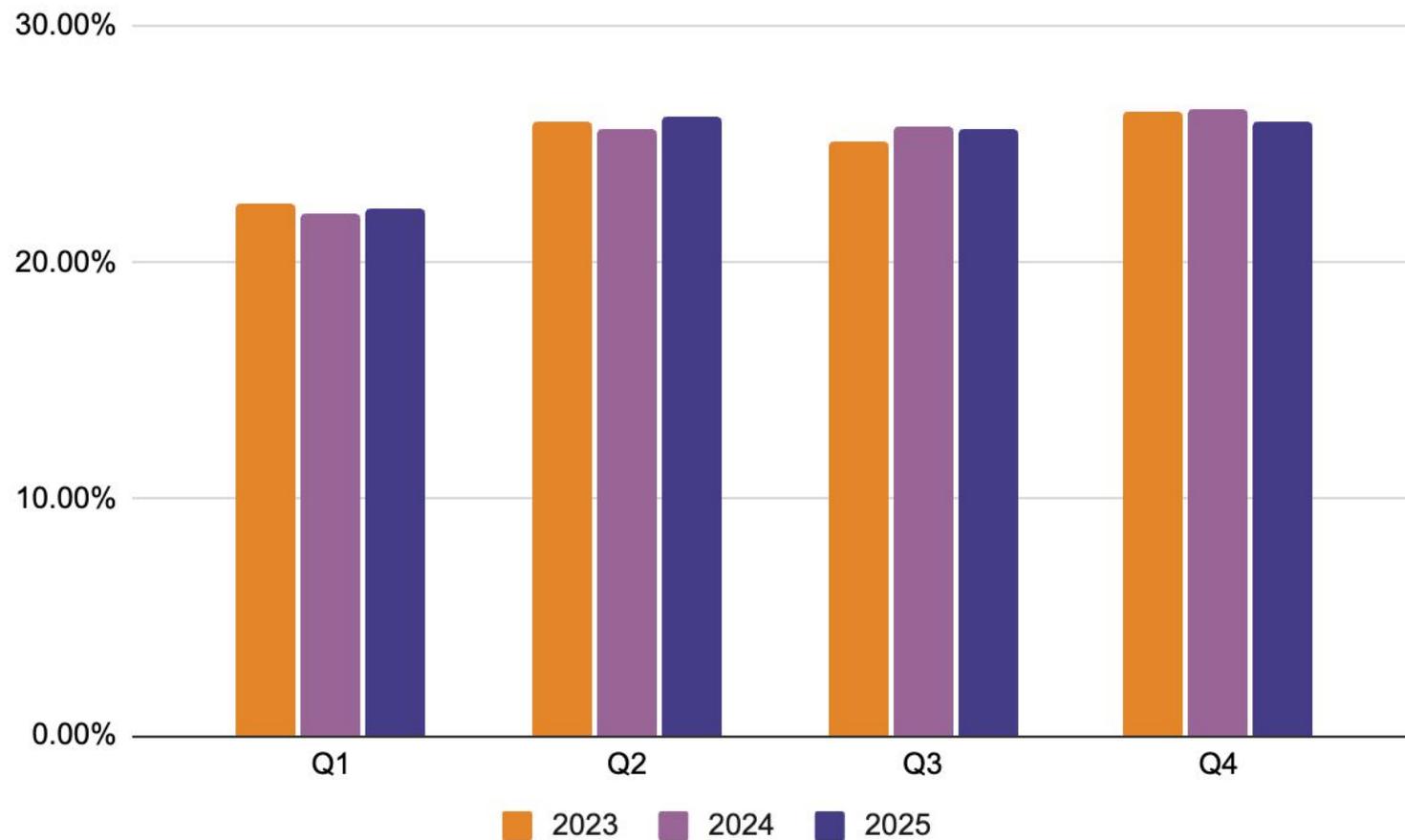


Sales By Month

	2024	2025
Jan	4.42%	4.68%
Feb	8.84%	8.76%
Mar	9.33%	9.18%
Apr	9.28%	9.26%
May	8.49%	8.56%
Jun	6.44%	6.79%
Jul	5.87%	6.25%
Aug	8.28%	8.21%
Sep	11.69%	11.49%
Oct	11.20%	11.26%
Nov	9.65%	9.22%
Dec	6.52%	6.35%

Cases By Quarter

750ml Only



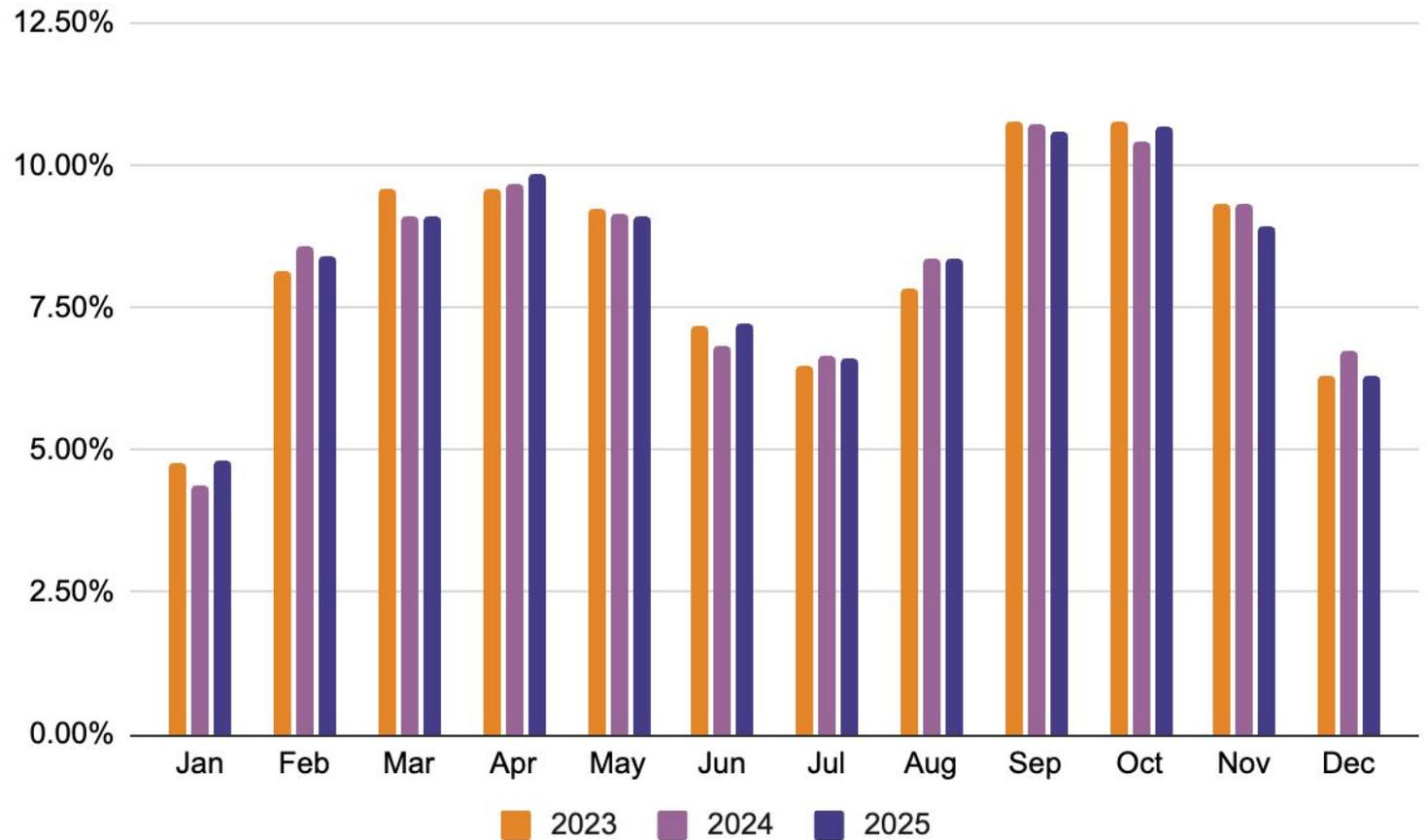
Cases By Quarter

750ml Only

	2023	2024	2025
Q1	22.51%	22.12%	22.30%
Q2	25.97%	25.68%	26.20%
Q3	25.10%	25.72%	25.60%
Q4	26.41%	26.48%	25.91%

Cases By Month

750ml Only



Cases By Month

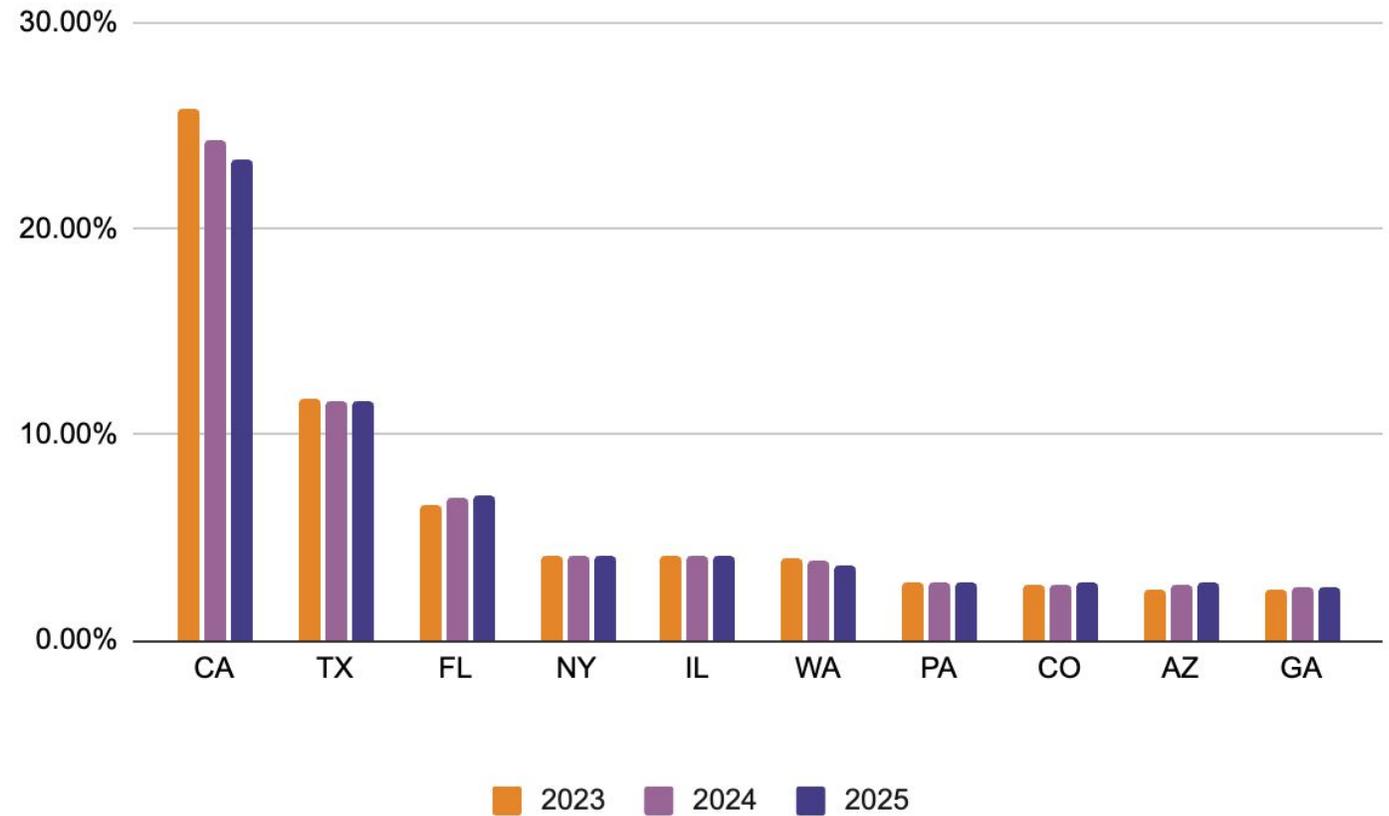
750ml Only

	2023	2024	2025
Jan	4.78%	4.39%	4.80%
Feb	8.13%	8.60%	8.40%
Mar	9.61%	9.12%	9.09%
Apr	9.57%	9.69%	9.87%
May	9.23%	9.16%	9.11%
Jun	7.17%	6.83%	7.22%
Jul	6.48%	6.65%	6.63%
Aug	7.84%	8.35%	8.36%
Sep	10.78%	10.72%	10.61%
Oct	10.77%	10.41%	10.67%
Nov	9.32%	9.33%	8.95%
Dec	6.32%	6.74%	6.29%

Sales By Delivery Method

	2023	2024	2025
Carry Out			27.89%
Pickup	45.93%	46.65%	19.80%
Ship	54.07%	53.35%	52.30%

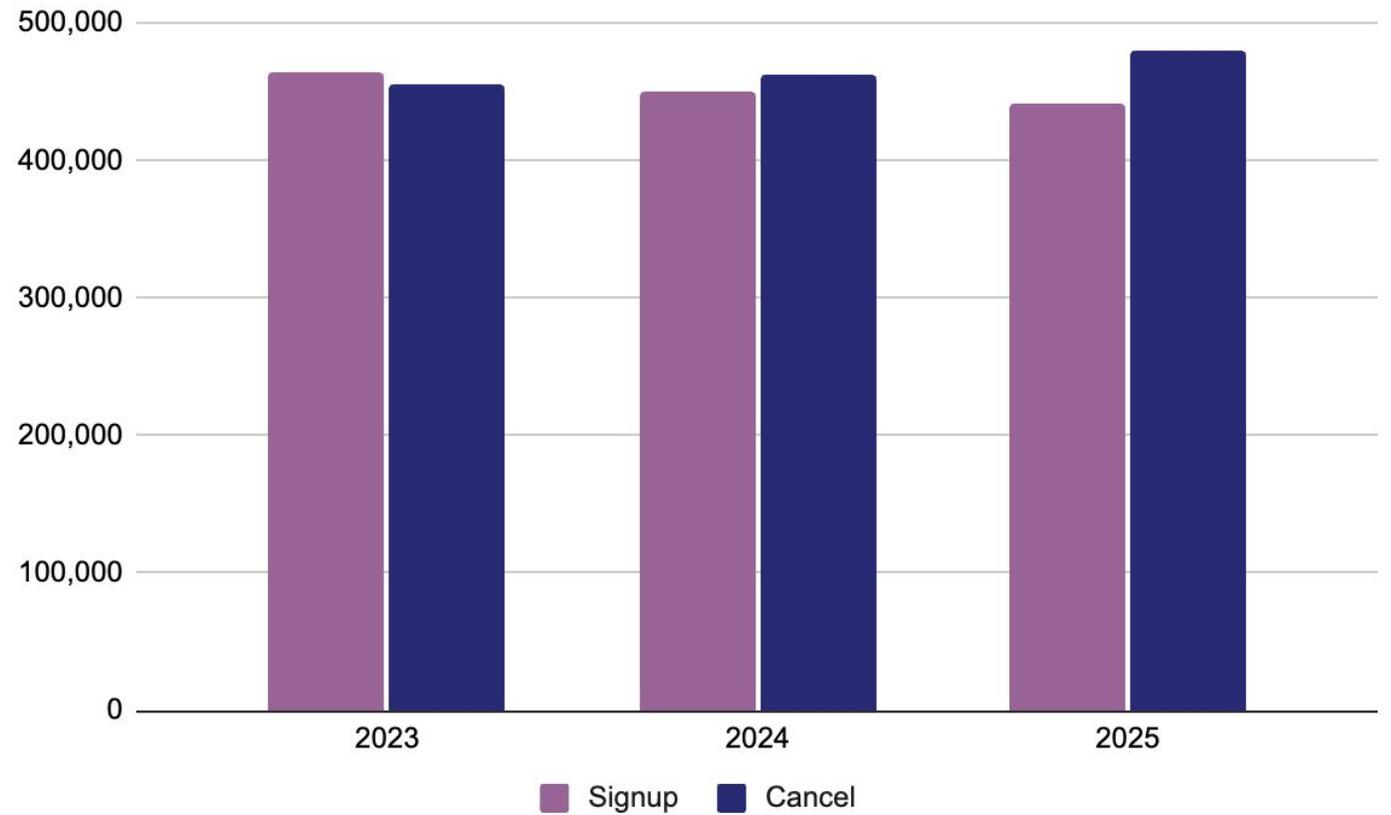
Sales By Ship State



Sales By Ship State

	2023	2024	2025
CA	25.82%	24.33%	23.32%
TX	11.71%	11.62%	11.65%
FL	6.58%	6.92%	7.05%
NY	4.12%	4.14%	4.13%
IL	4.08%	4.13%	4.13%
WA	3.97%	3.83%	3.69%
PA	2.79%	2.87%	2.89%
CO	2.75%	2.73%	2.77%
AZ	2.52%	2.68%	2.77%
GA	2.49%	2.53%	2.64%

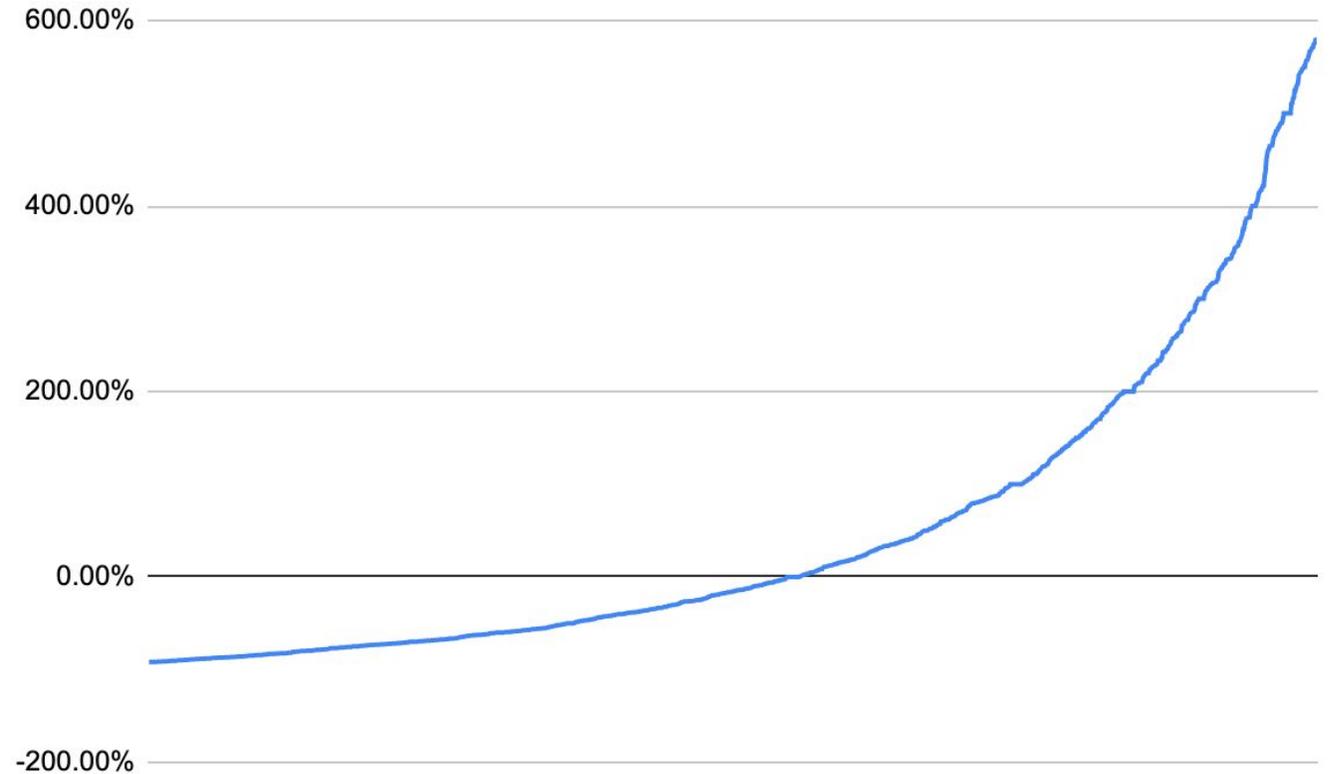
Club Growth



Club Growth

	2023	2024	2025
Growth Rate	2.16%	-2.65%	-8.27%

Club Growth By Winery

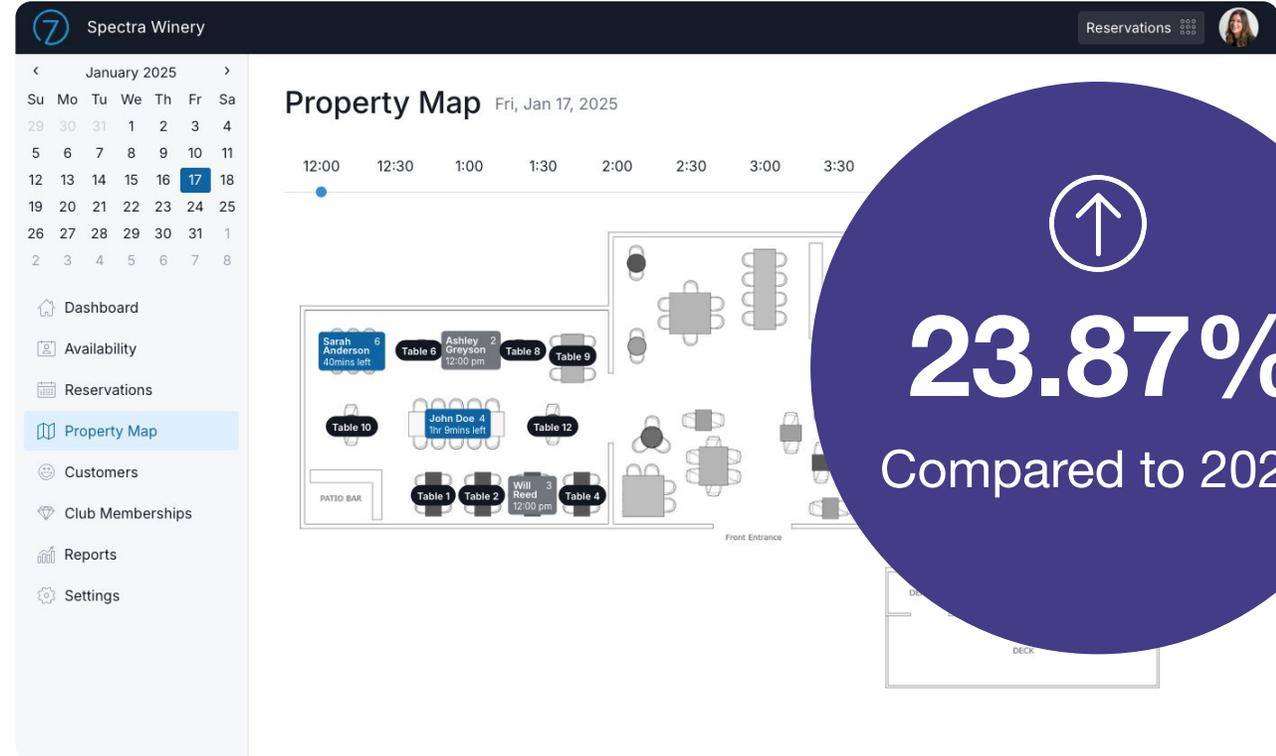


3500 Commerce7 wineries.

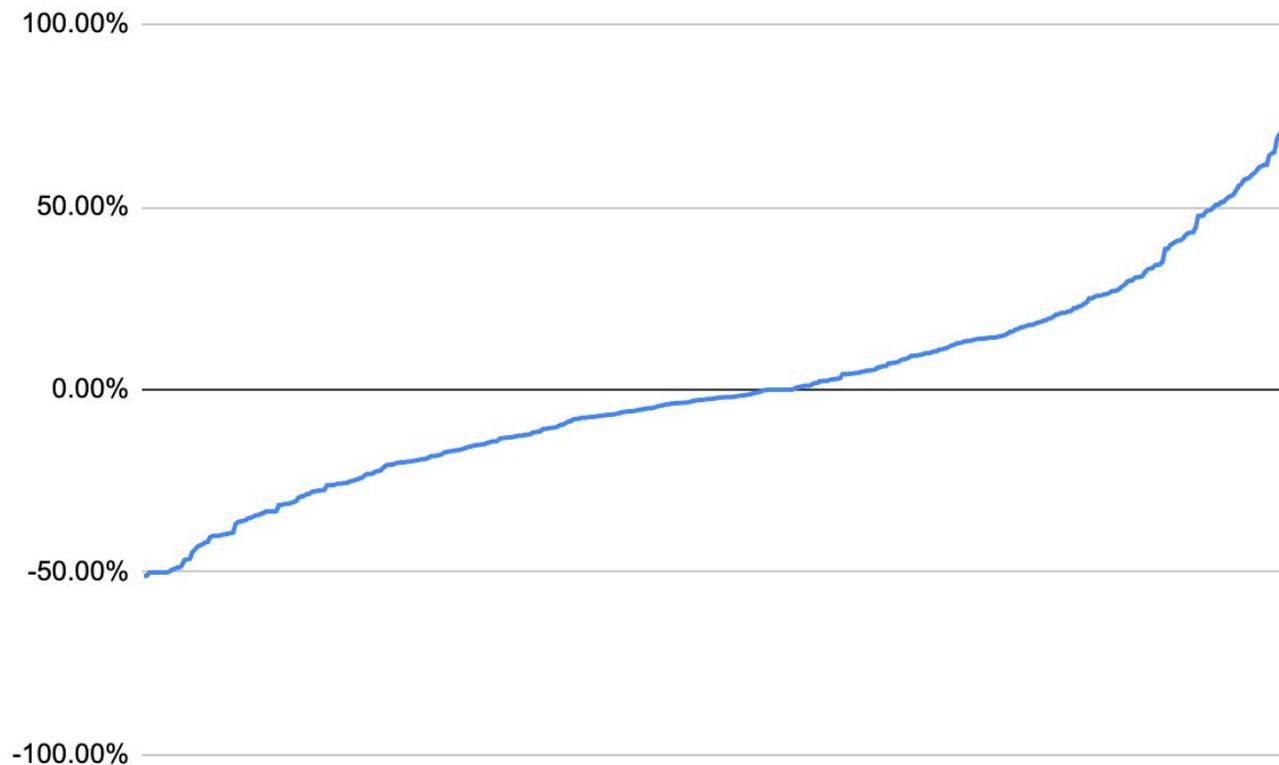
Smaller wineries are signing up a large number of club members relative to their current club size.

Reservation Growth

Doesn't match to Napa

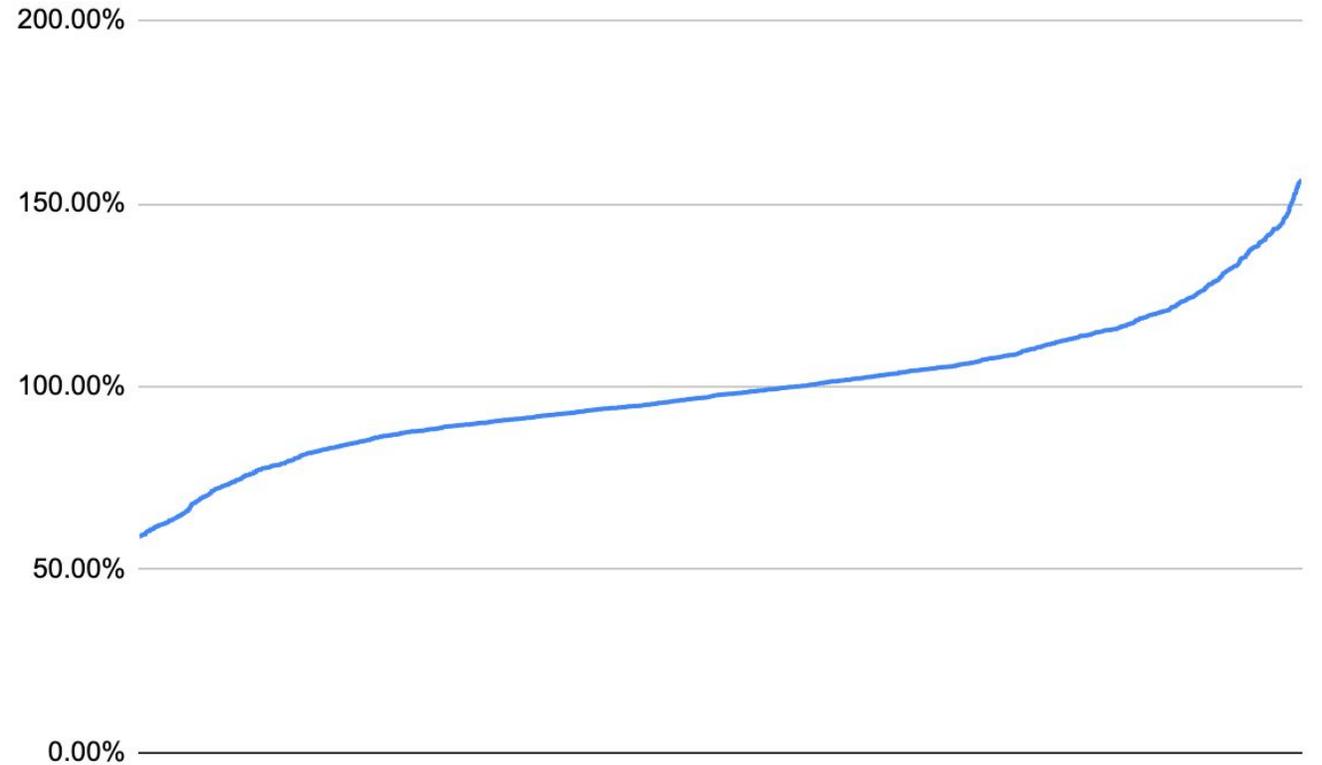


Reservation Growth By Winery



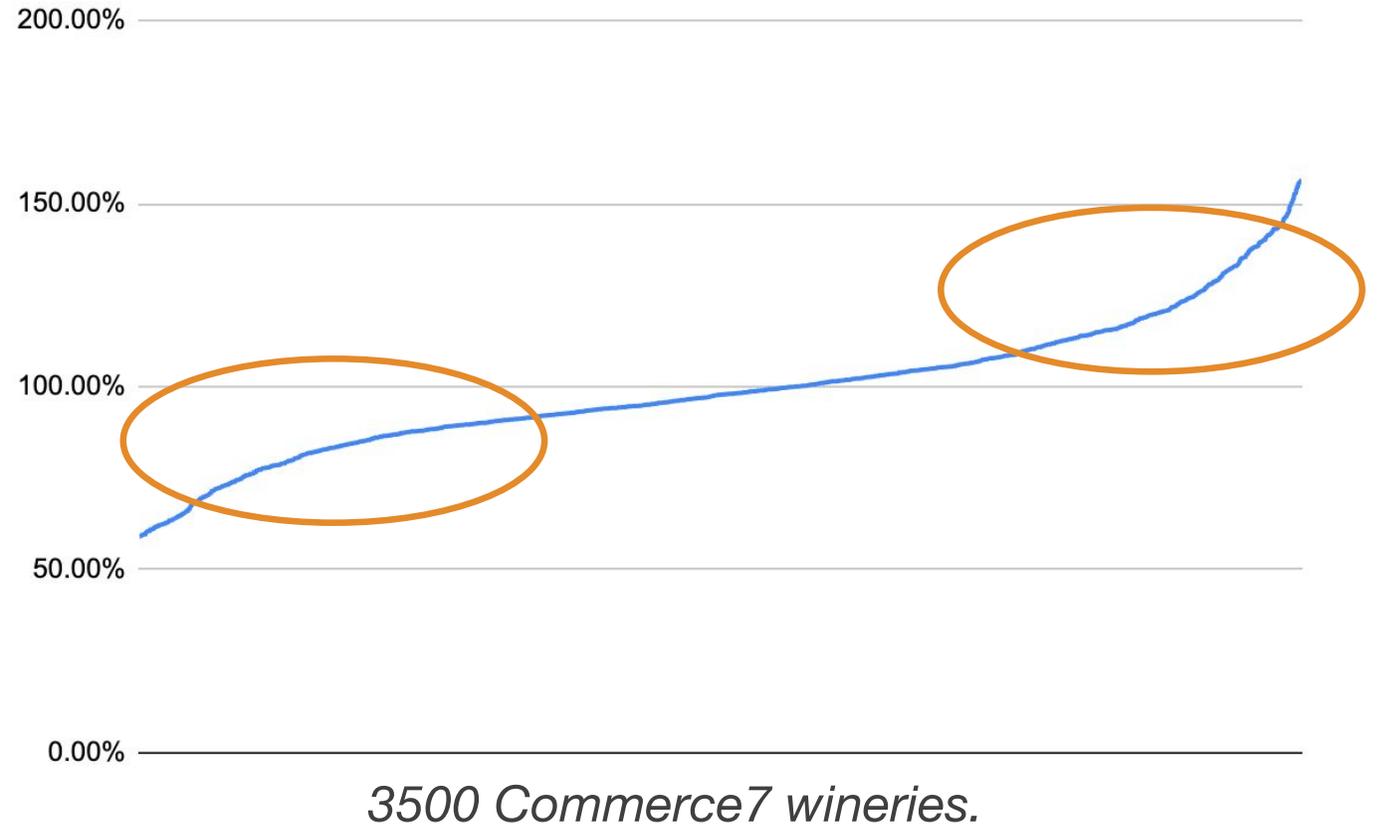
3500 Commerce7 wineries.

Overall DTC Growth By Winery



3500 Commerce7 wineries.

What is the right doing different than the left?

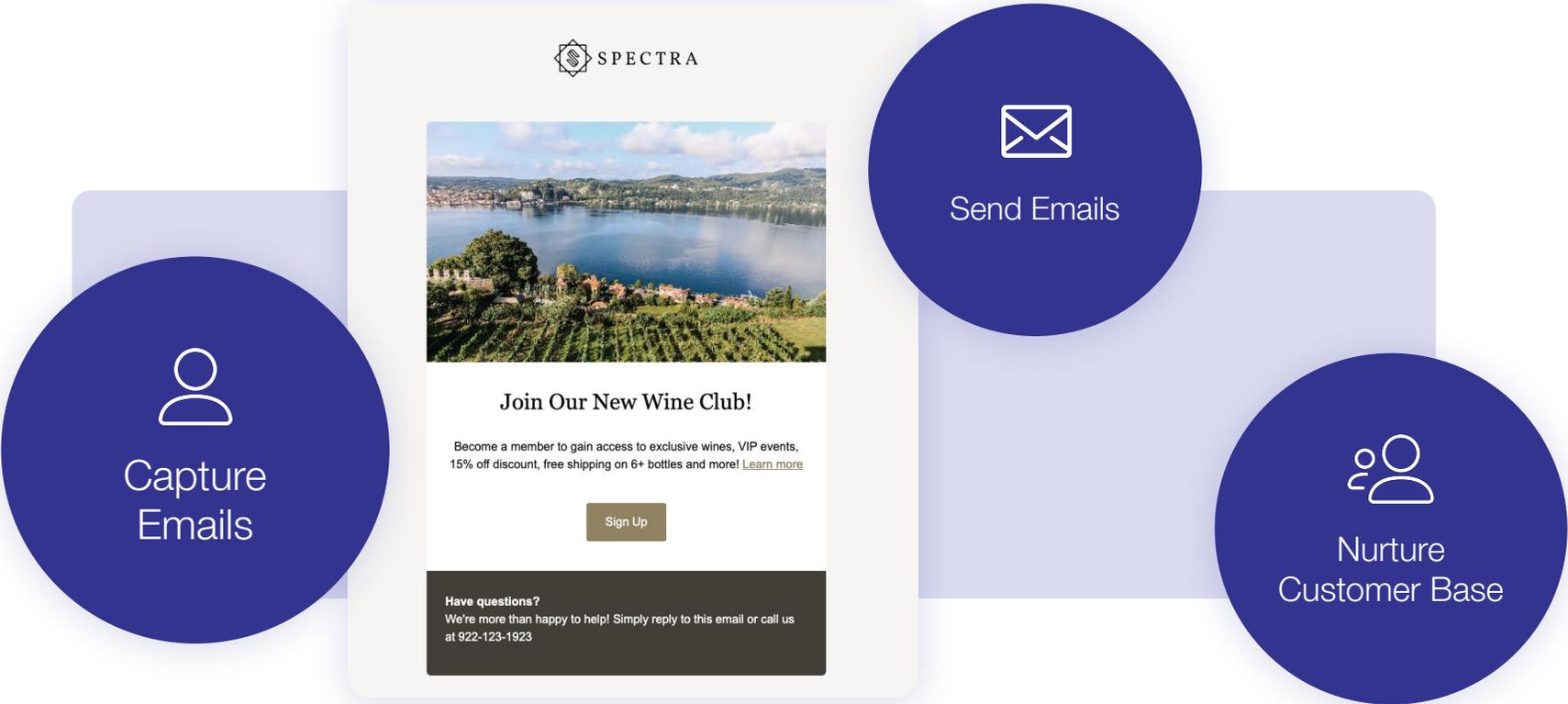




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The Top 10%

They Dial in the Basics



They Capture Email Addresses



Top 10%
92.36%



Top 25%
75.96%



Average
46.97%

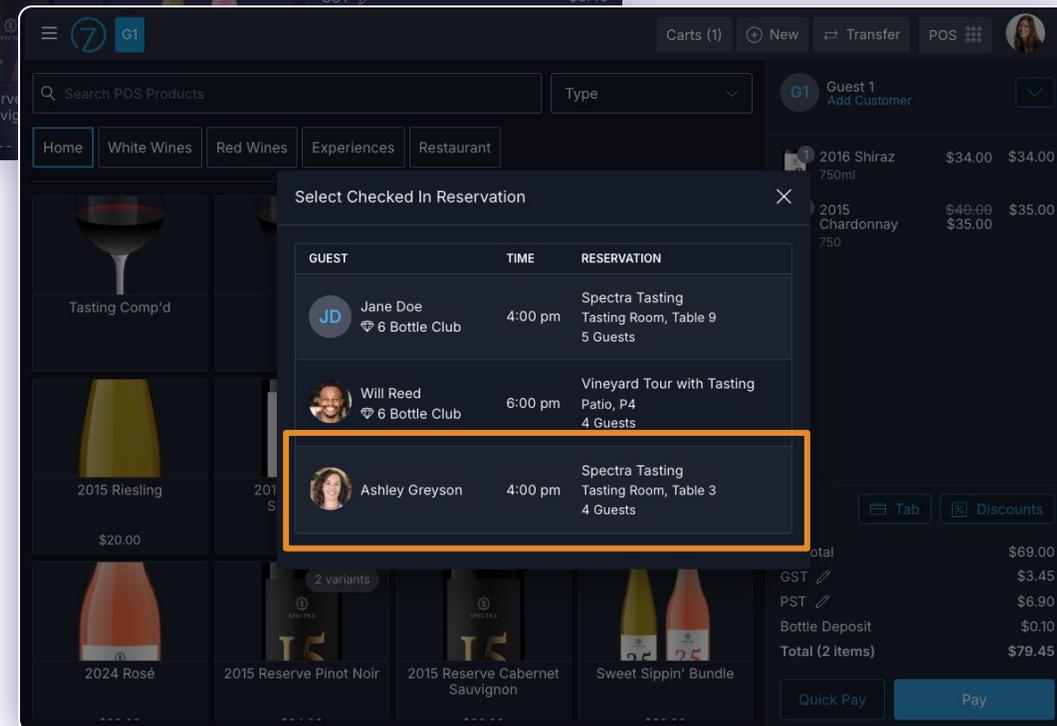
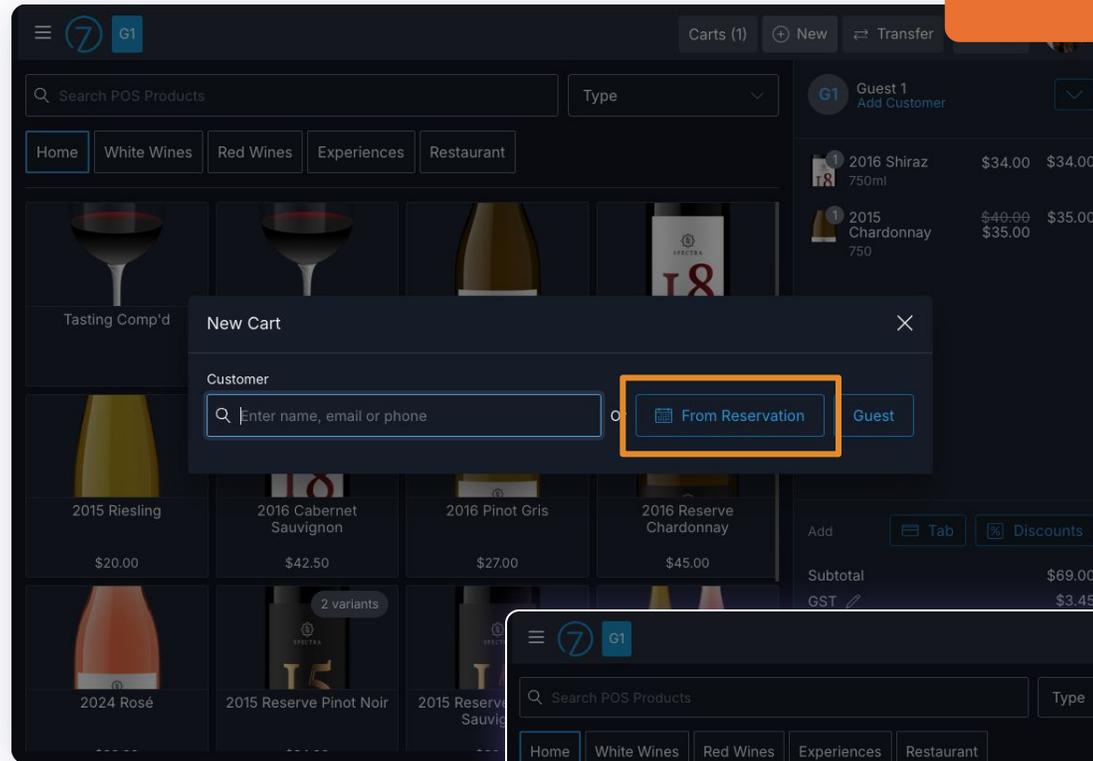
They Capture Email Addresses

Email capture rate



They Capture Email Addresses

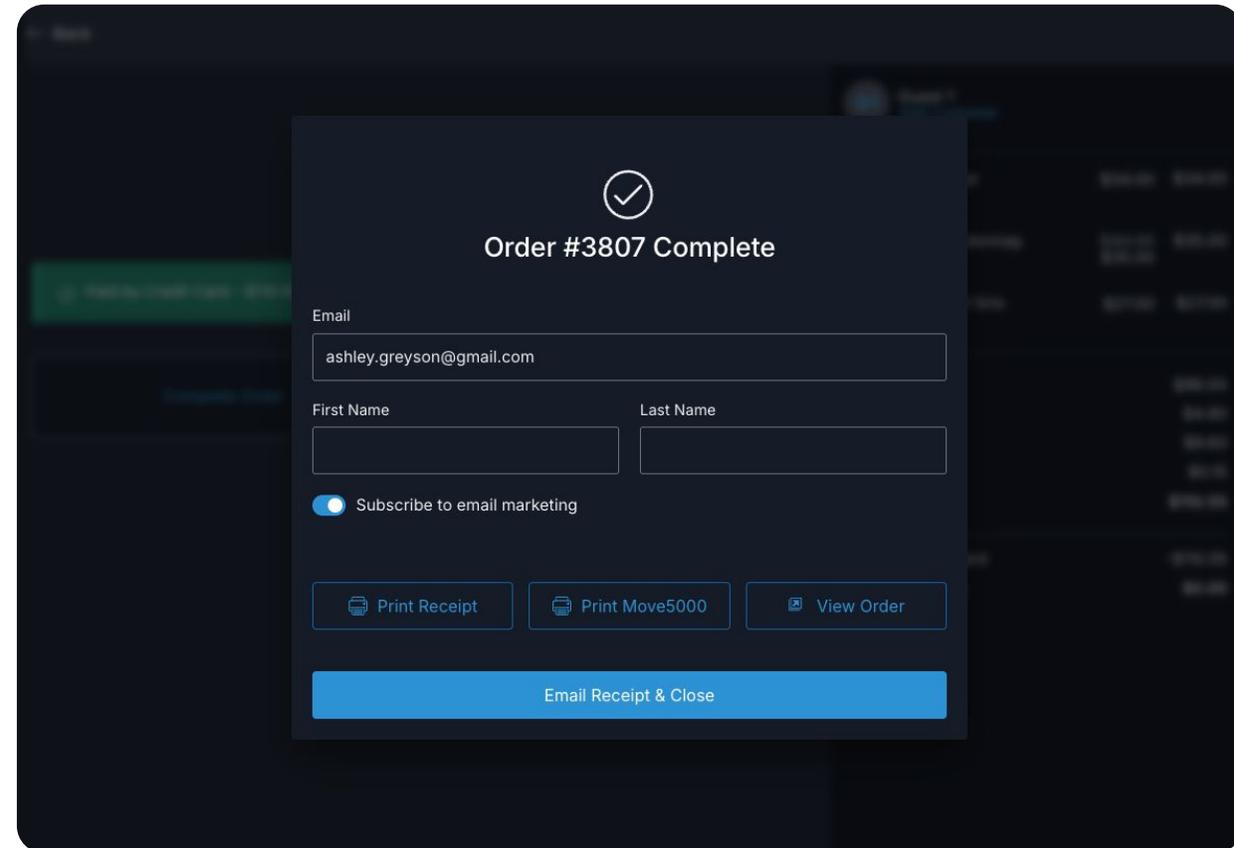
Idea #1. Link your reservation data



They Capture Email Addresses

Idea #2

“How was your experience today?”



A screenshot of a Commerce 7 order completion modal. The modal is dark-themed with a white checkmark icon at the top center, followed by the text "Order #3807 Complete". Below this, there is an "Email" field containing "ashley.greyson@gmail.com". Underneath are two input fields for "First Name" and "Last Name". A toggle switch for "Subscribe to email marketing" is turned on. At the bottom, there are three buttons: "Print Receipt", "Print Move5000", and "View Order". A large blue button at the very bottom says "Email Receipt & Close".

They Send Emails

Emails sent vs number of customers



*Wineries who use Commerce7 as the primary campaign tool

They Communicate With Customers

Commerce⁷

888 wineries

 mailchimp

571 wineries

redchirp

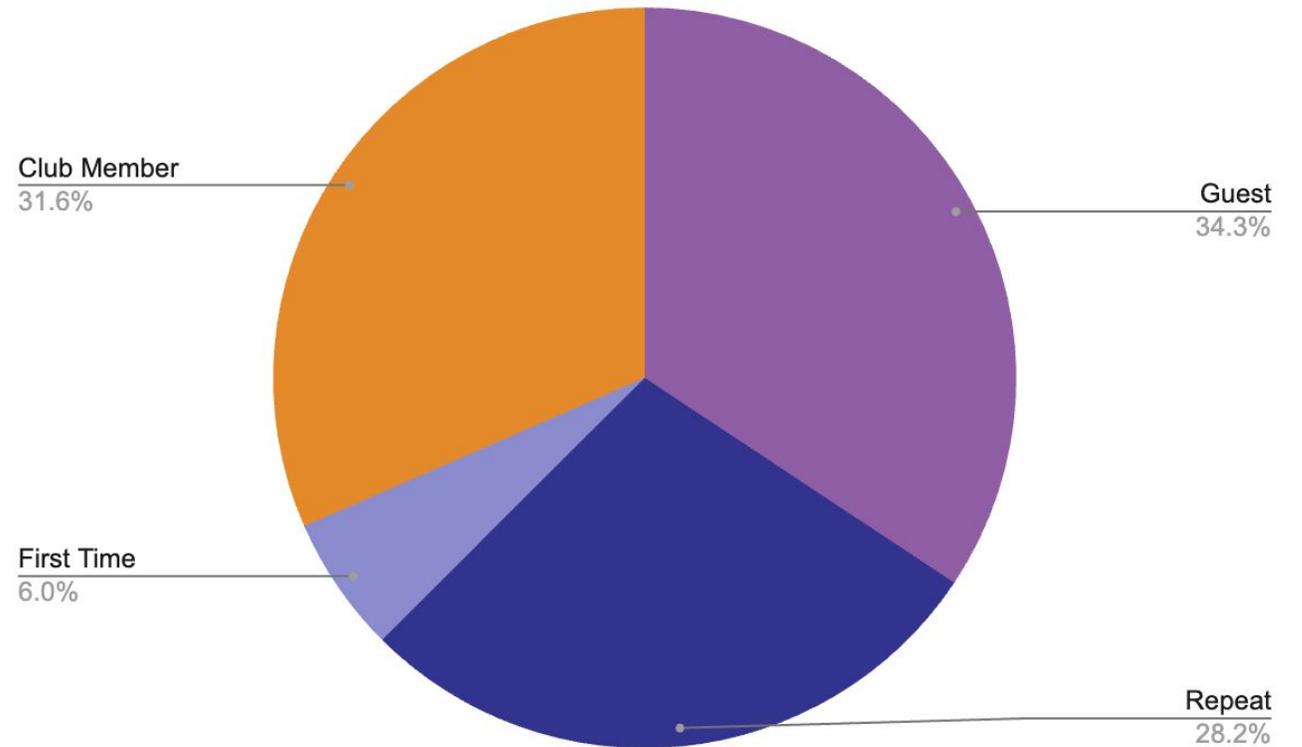
469 wineries

klaviyo[™]

388 wineries

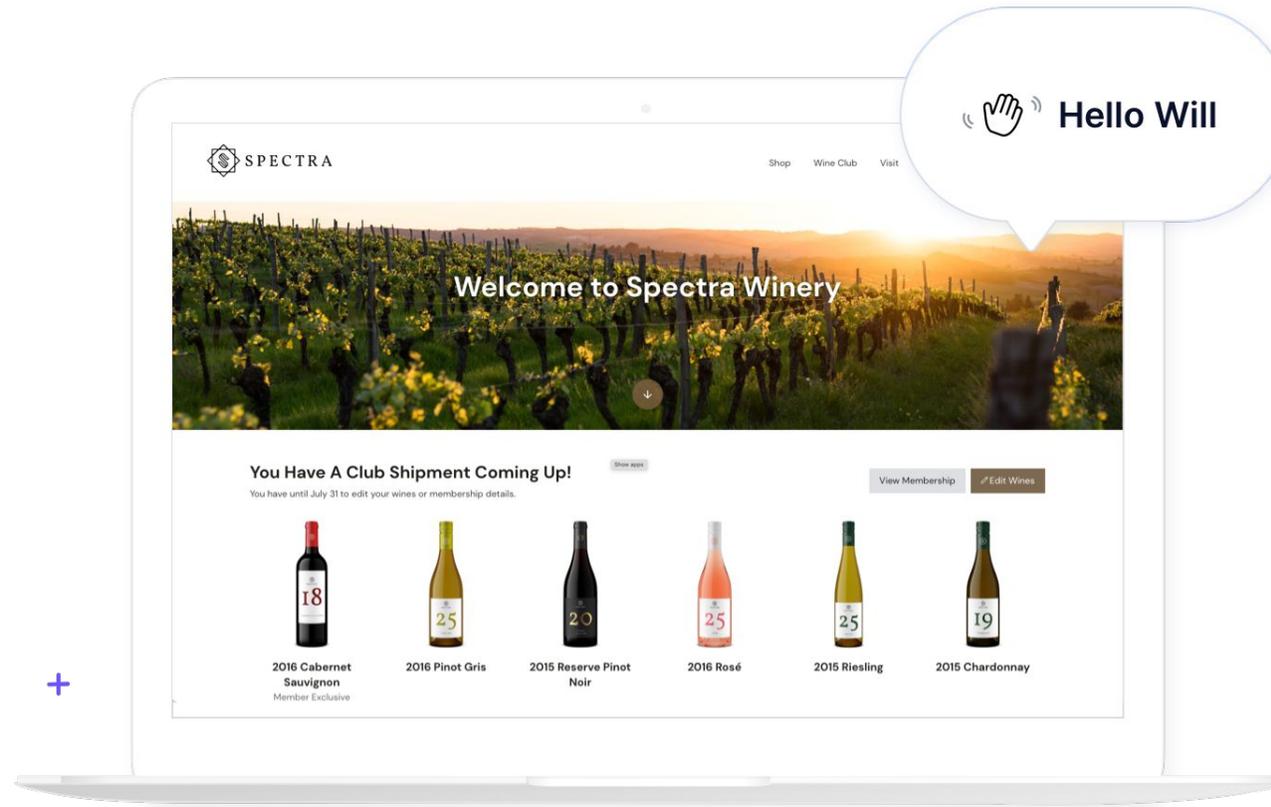


They Nurture Their Customer Base

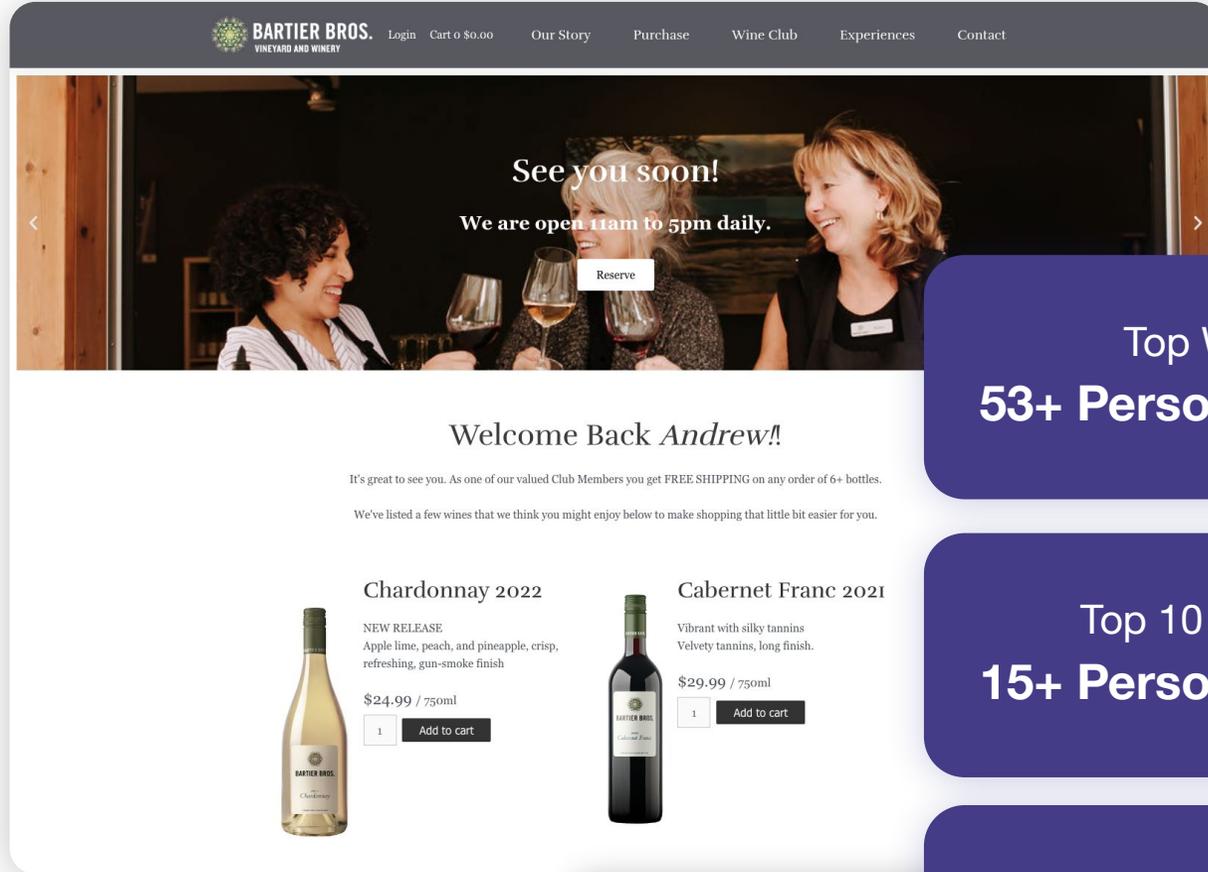


Where orders come from

They Focus on the Customer Experience



They Use Personalizations

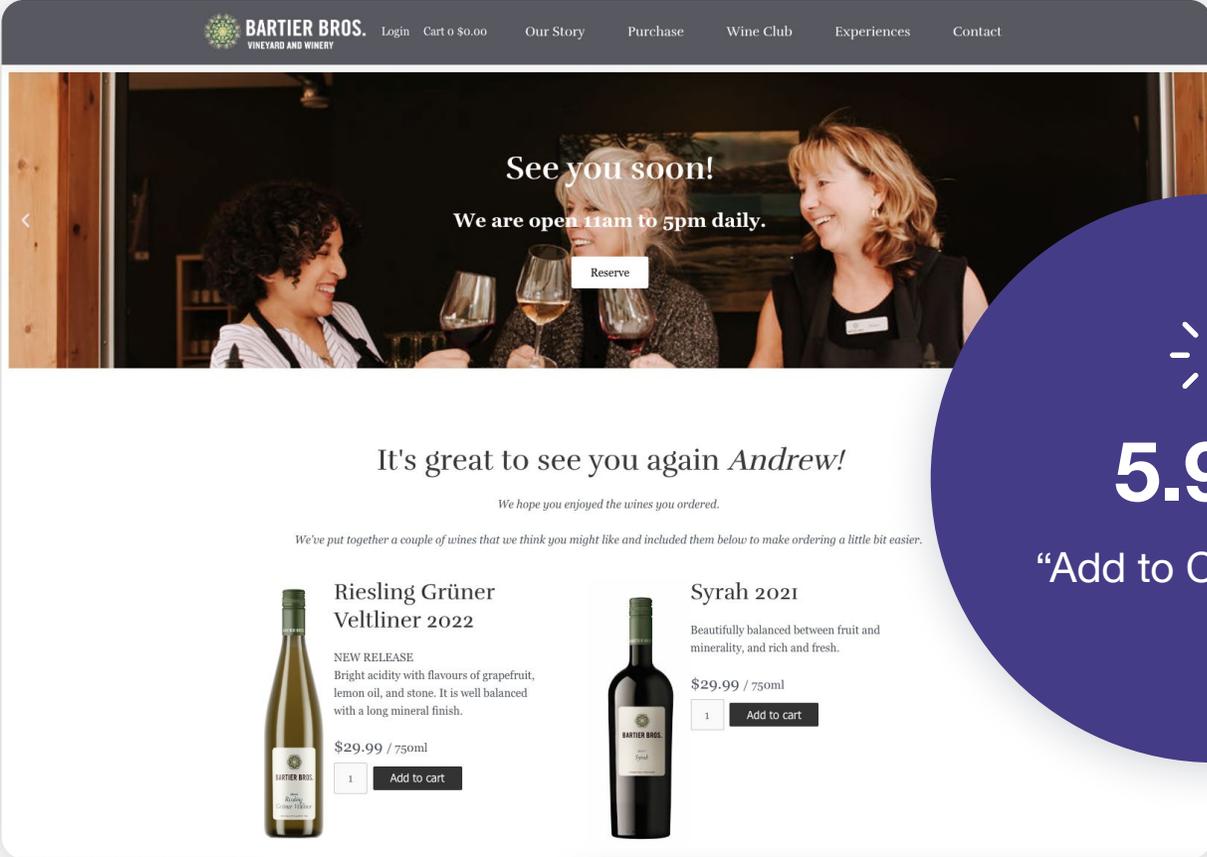


Top Winery
53+ Personalizations

Top 10 Wineries
15+ Personalizations

Top 10%
2 Personalizations

They Use Personalizations



5.94x
"Add to Cart" clicks

They Use Personalizations

Chosen for you

4.5x

More likely to
add to their cart



They Use Personalizations

Amazon

Buy again



More in Buy Again

Deals related to items that you've saved



See all deals



They Use Personalizations

Repeat Customer



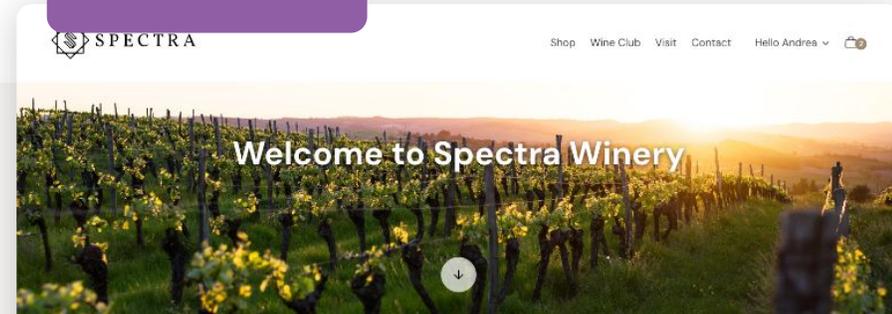
A selection of our wines
We Think You'll Enjoy

Out of our variety of wines, we have a hunch that you'll like these ones.
[View all wines](#)

 2015 Chardonnay Walla Walla Aromas abound of red apple complimented by subtle notes of vanilla bean and piecrust. An excellent balance of luxurious mouth-feel and food pairing acidity. Member Pricing \$40.00 \$29.75 / 75cl 1 Add to Cart	 2024 Rosé Niagara Light coral color with a whisper of pink, aromas of Rhubarb pie and framboise. Dry and crisp on the palate. Member Pricing \$29.00 \$17.00 / 750ml 1 Add to Cart
--	--

The quality that you deserve
Our Wines
Crafted with care and the finest ingredients, from our family to yours.
[View our wines](#) →

Club Member



Welcome back Andrea!
You Have A Club Shipment Coming Up!

[View Membership](#) [Edit Wines](#)

You have until Apr 14, 2026 to edit your wines or membership details.

 2016 Cabernet Sauvignon 750ml \$49.50 \$34.00 X 2 \$68.00	 2024 Rosé 750ml \$60.00 \$16.00 X 2 \$32.00	 2016 Shiraz 750ml \$84.00 \$27.20 X 2 \$54.40	 2015 Reserve Pinot Noir Magnum \$66.00 \$36.00 X 1 \$36.00	 2015 Riesling 750ml \$66.00 \$16.00 X 2 \$32.00	 2015 Reserve Cabernet Sauvignon 750ml \$66.00 \$48.00 X 1 \$48.00
--	--	--	---	--	--

[Skip Shipment](#) Total **\$375.86**

They Use Carrots

Focus On Customer Experience



Top 1%
36 Carrots



Top 10%
20 Carrots

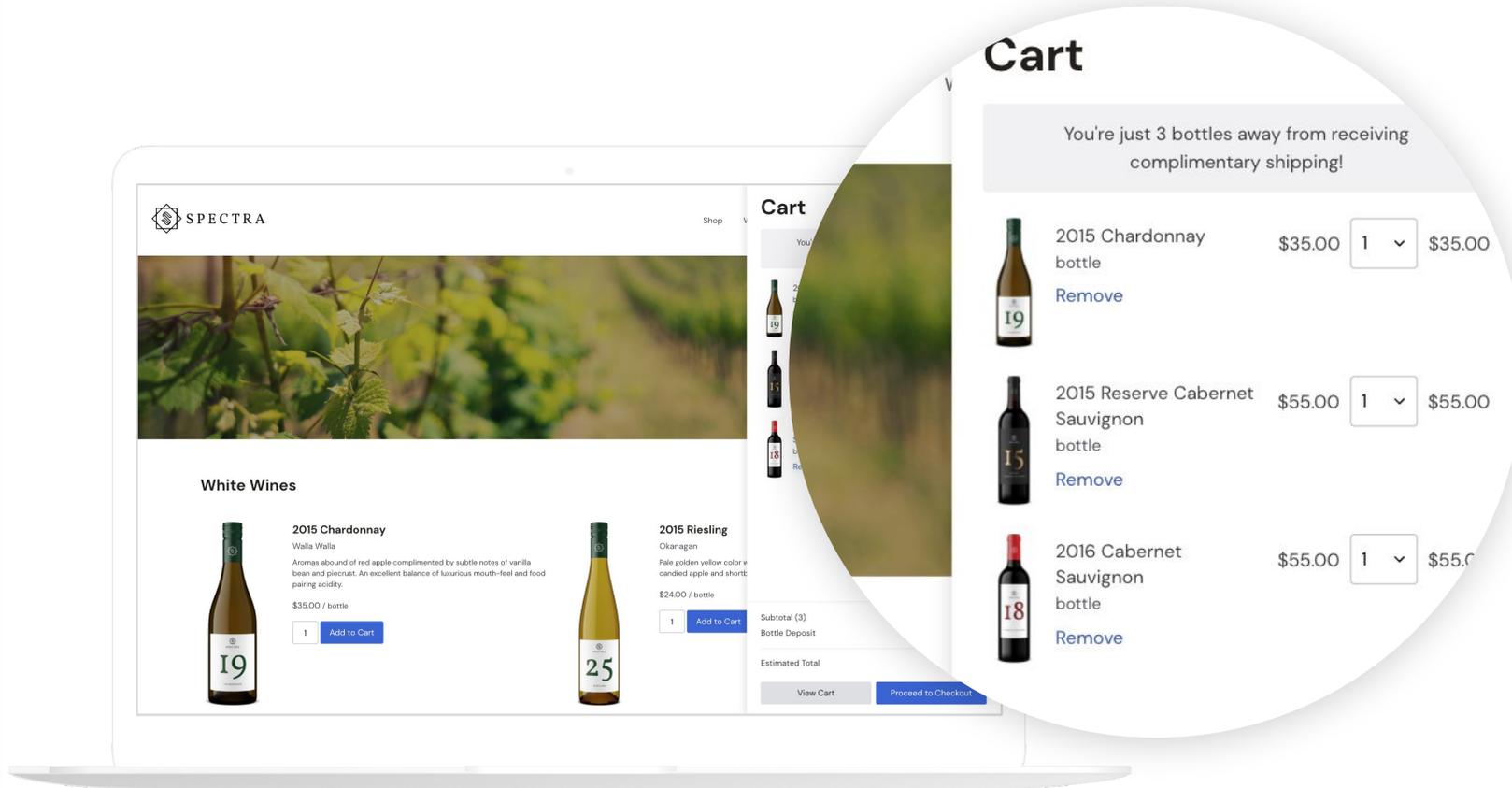


Top 25%
4 Carrots

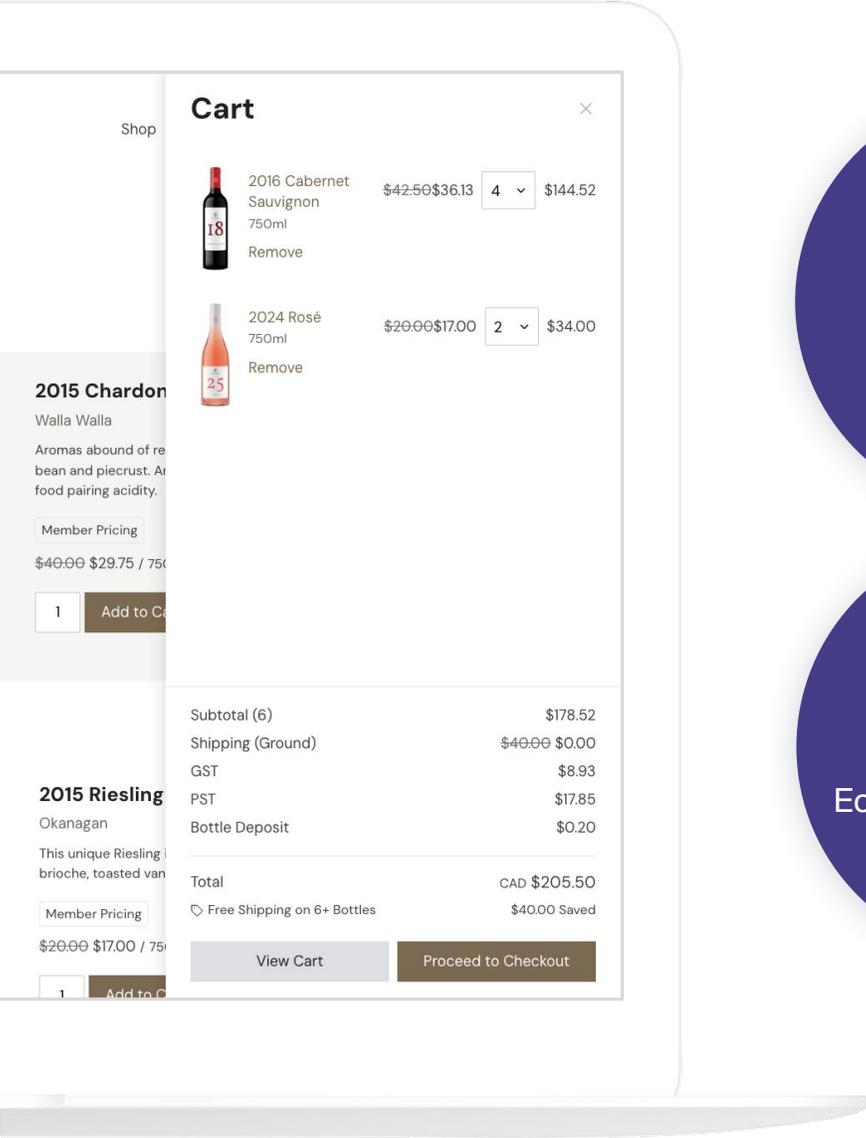


Median
1 Carrot

They Use Carrots



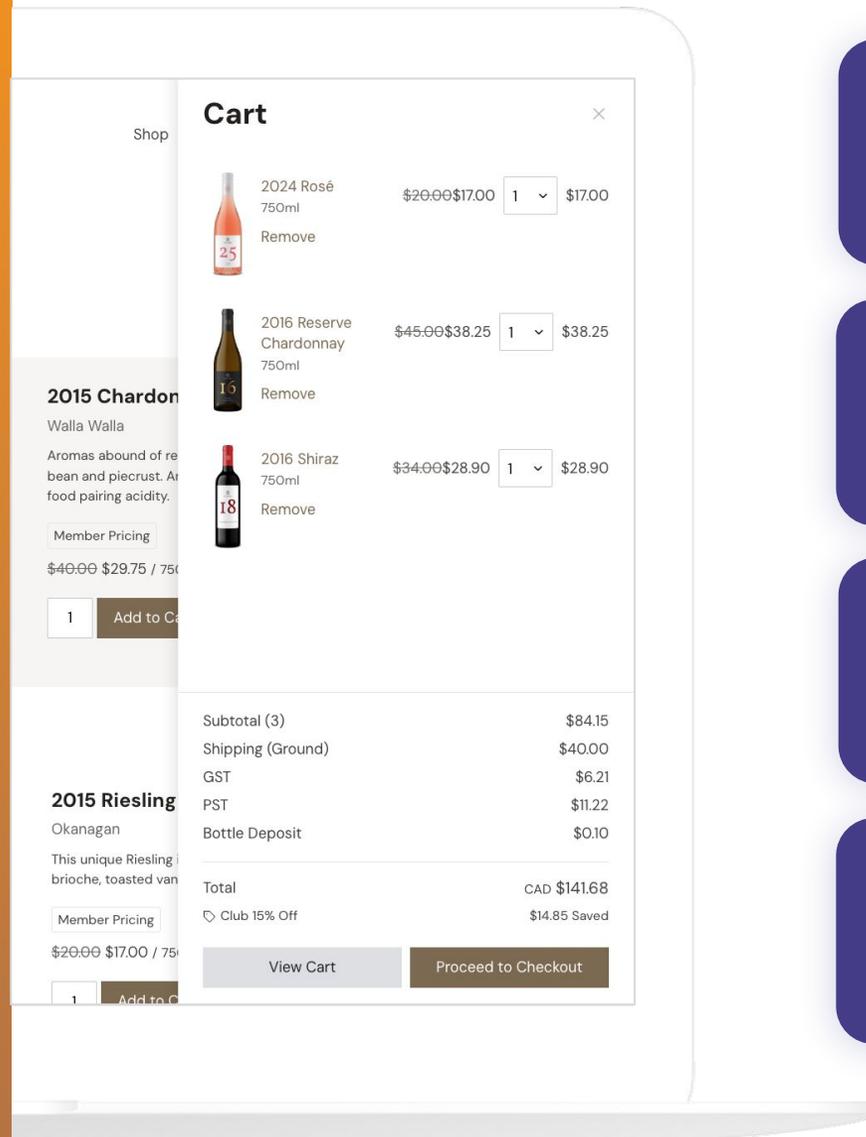
They Use Promotions to Drive Ecommerce Sales




22.5%
Ecommerce orders with free shipping


14.5%
Ecommerce orders with more than 50% off shipping

They Use Promotions to Drive Ecommerce Sales



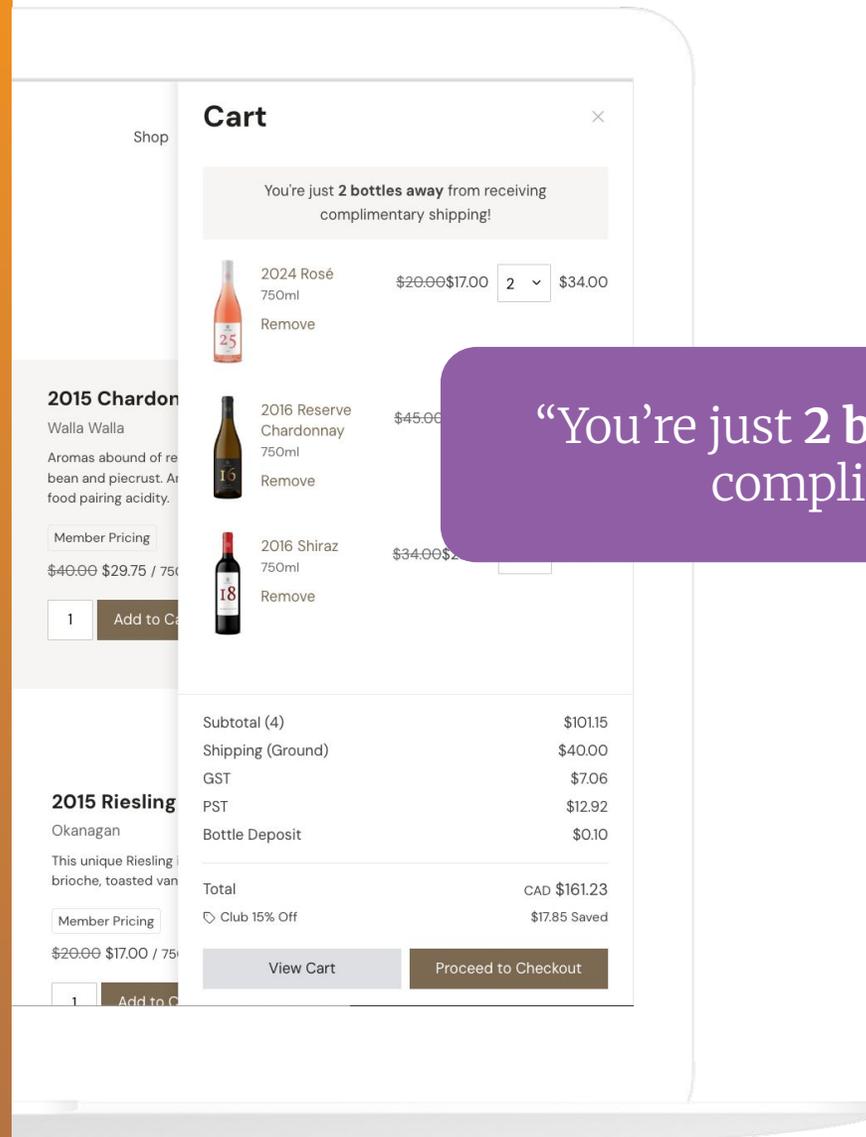
 **17.2%**
Orders with 10%+ Off

 **8.5%**
Orders with 20%+ Off

 **4.6%**
Orders with 30%+ Off

 **2.3%**
Orders with 50%+ Off

They Use Promotions to Drive Ecommerce Sales



“You’re just 2 bottles away from receiving complimentary shipping!”

They Allow Club Members to Edit Club Shipments

Your Shipment
5 selected (Min 4 products) • Subtotal \$156.60

Discard Changes Save Selections



2016 Pinot Gris
~~\$26.00~~ \$23.40



2016 Rose
~~\$24.00~~ \$21.60



2016 Rose
~~\$24.00~~ \$21.60



2016 Cabernet Sauvignon
~~\$55.00~~ \$49.50



2016 Reserve Chardonnay
~~\$45.00~~ \$40.50

Available Wines



2016 Pinot Gris
750ml
~~\$26.00~~ \$23.40
Member pricing

Donec id elit non mi porta gravida at eget metus. Donec sed odio dui. Donec sed odio dui. Vivamus sagittis lacus vel augue laoreet rutrum faucibus dolor auctor. Vivamus sagittis lacus vel augue laoreet rutrum faucibus dolor auctor. Donec sed odio dui. Integer posuere erat a ante venenatis dapibus posuere velit aliquet.

- 1 +



2016 Cabernet Sauvignon
750ml
~~\$55.00~~ \$49.50
Member pricing

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- 1 +
Min Qty: 1



2015 Chardonnay
750ml
~~\$35.00~~ \$31.50
Member pricing

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+ Add



2015 Riesling
750ml
~~\$24.00~~ \$21.60
Member pricing

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2016 Rose
750ml
~~\$24.00~~ \$21.60
Member pricing

Donec id elit non mi porta gravida at eget metus. Donec sed odio dui. Donec sed odio dui. Vivamus sagittis lacus vel augue laoreet rutrum faucibus dolor auctor. Vivamus sagittis lacus vel augue laoreet rutrum faucibus dolor auctor. Donec sed odio dui. Integer posuere erat a ante venenatis dapibus posuere velit aliquet.

- 2 +
Qty: 1-6



2015 Reserve Pinot Noir
750ml
~~\$34.00~~ \$30.60
Member pricing

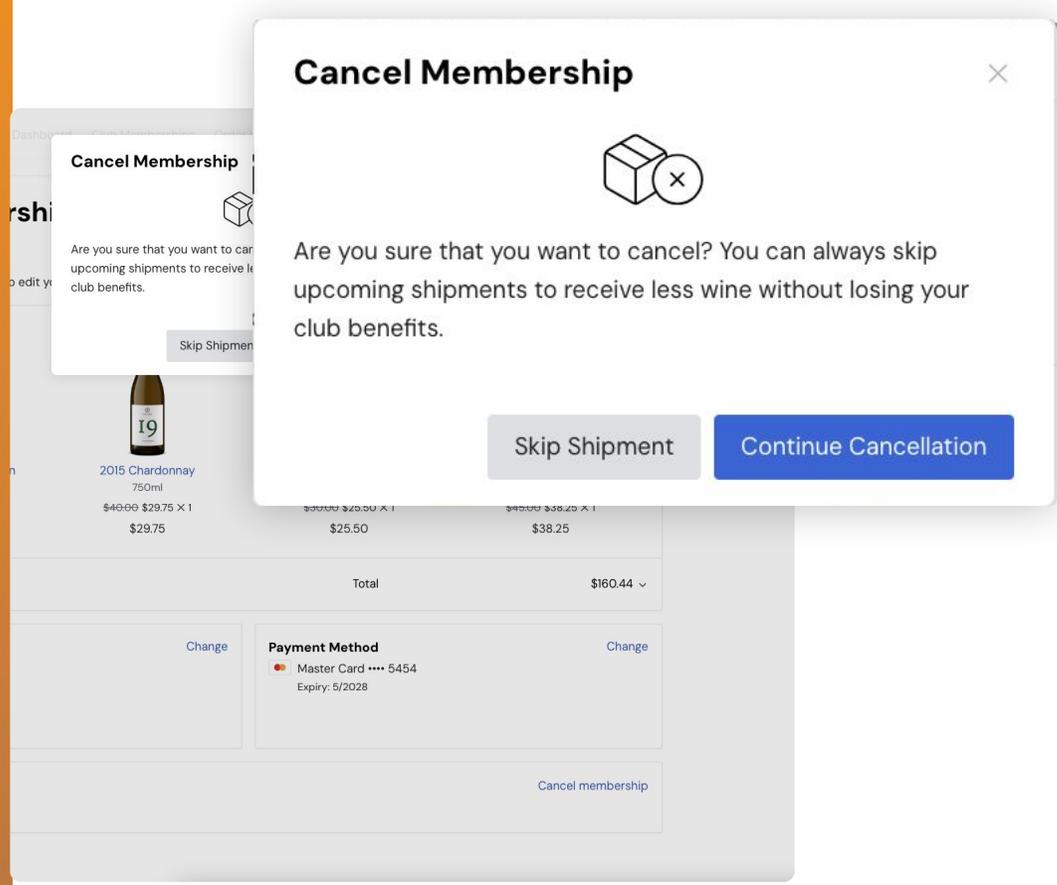
Donec id elit non mi porta gravida at eget metus. Donec sed odio dui. Donec sed odio dui. Vivamus sagittis lacus vel augue laoreet rutrum faucibus dolor auctor. Vivamus sagittis lacus vel augue laoreet rutrum faucibus dolor auctor. Donec sed odio dui. Integer posuere erat a ante venenatis dapibus posuere velit aliquet.

+ Add
Max Qty: 4


82%
Traditional club releases allow member edits


10-20%
Higher in value

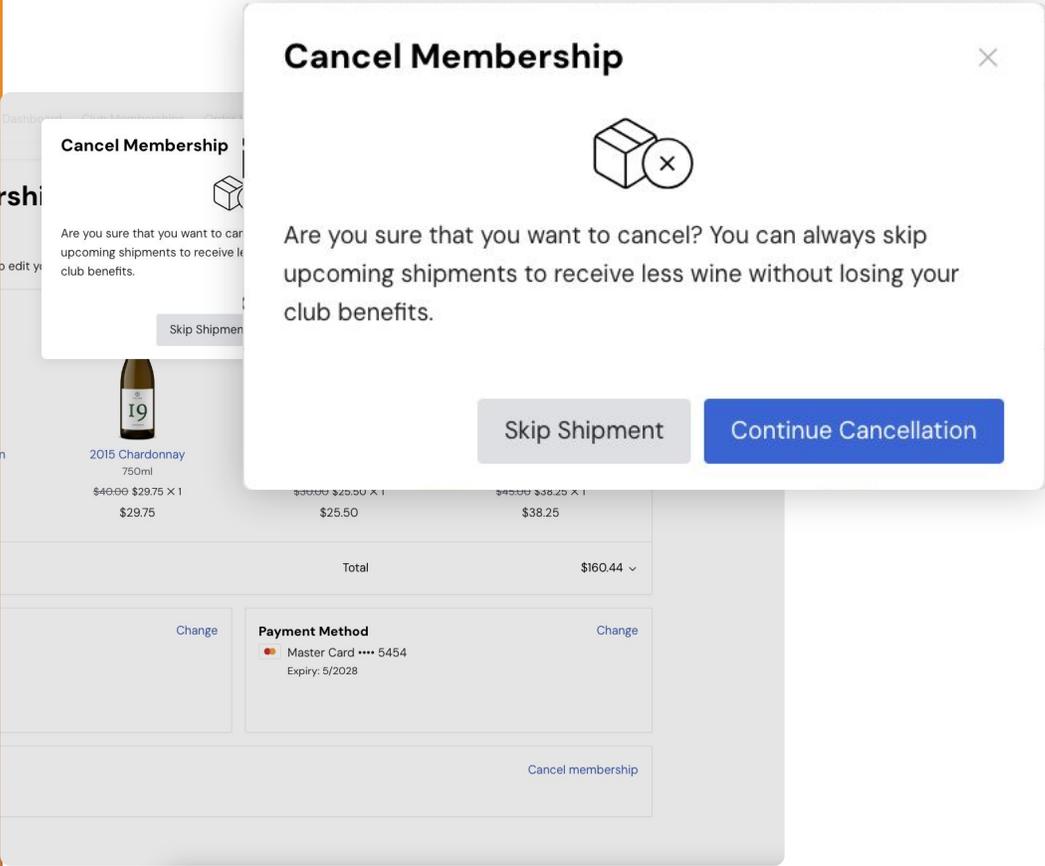
They Allow Club Members to Cancel Online



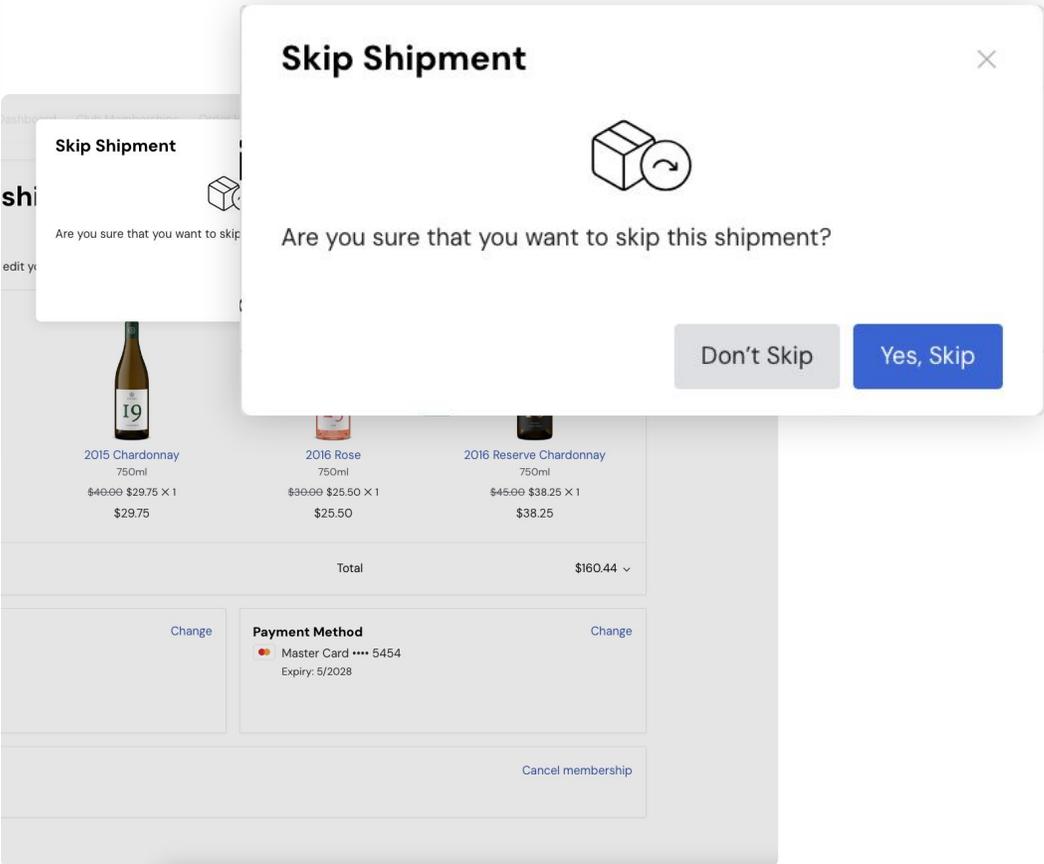

76%
Sometimes allow members to cancel online


62%
Always allow members to cancel online

They Allow Club Members to Cancel Online

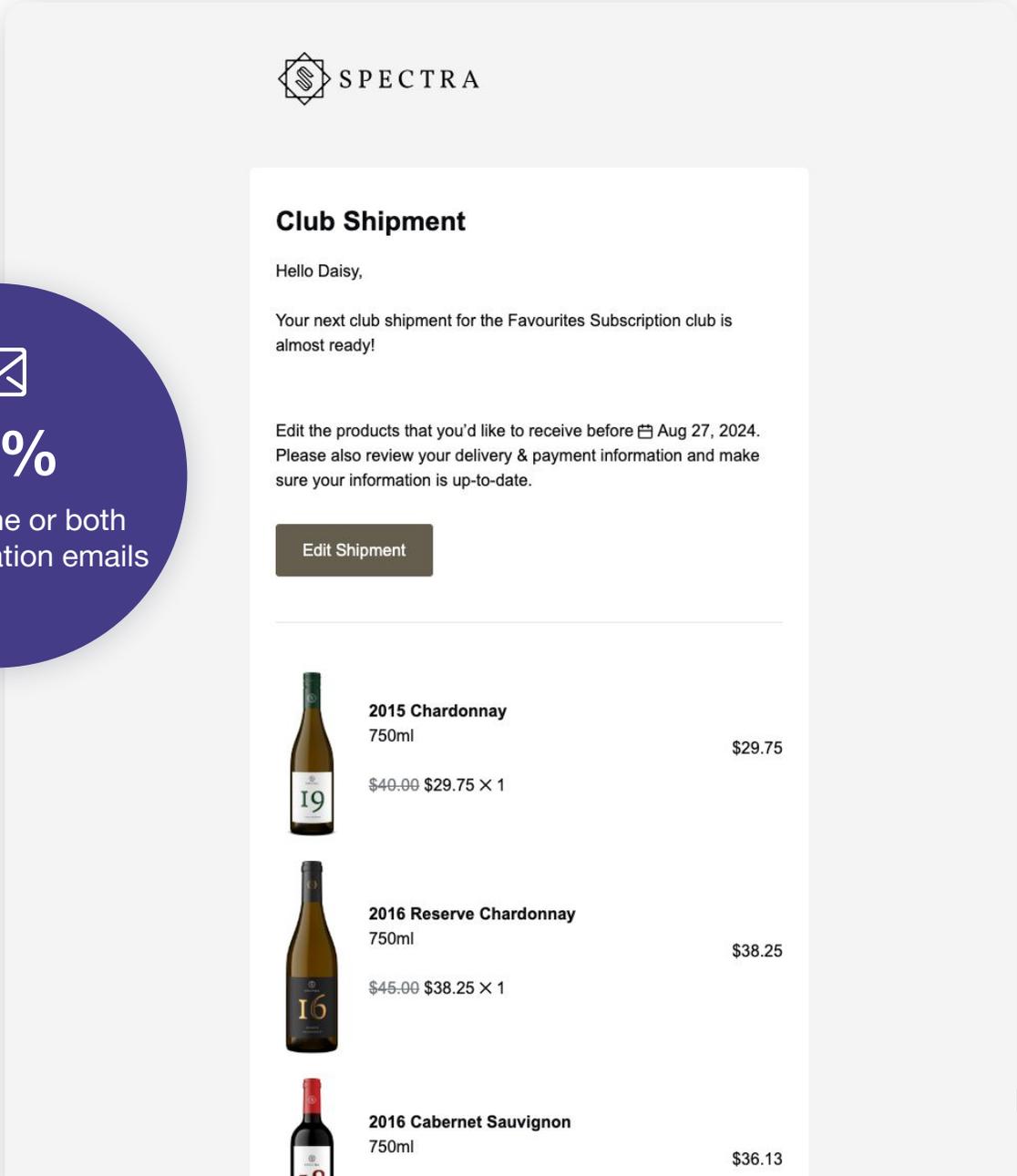


They Allow Club Members To Skip Club Shipments

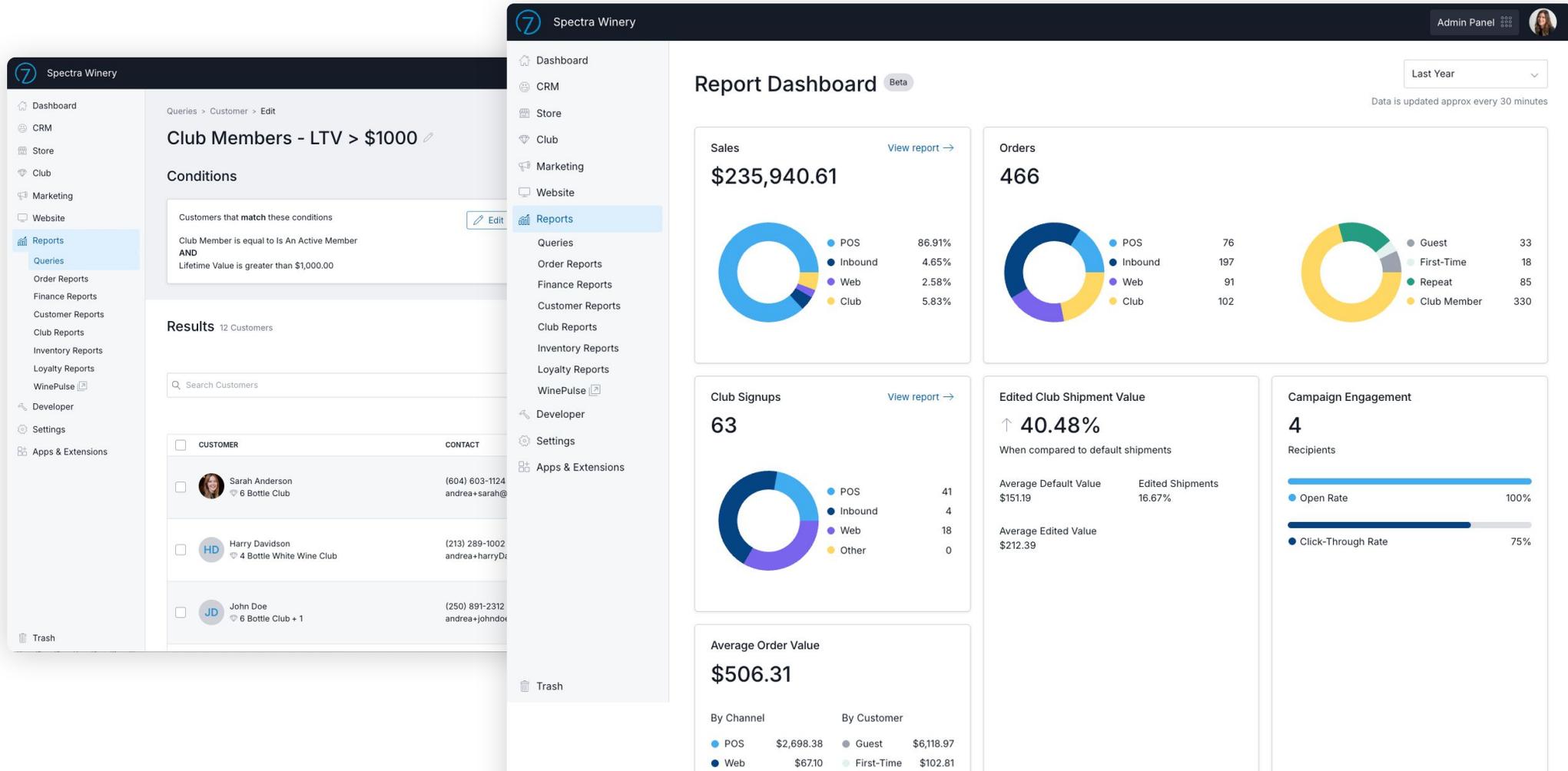


They Send Club Shipment Emails


45%
Disable one or both club notification emails



They Believe in Data



They Build Queries

They Believe In Data



Top 10%
68 Queries



Top 25%
26 Queries



Median
6 Queries



Average
25 Queries

They Build Queries

The screenshot displays the Commerce7 Spectra Winery interface. The left sidebar contains navigation options: Dashboard, CRM, Store, Club, Marketing, Website, Reports (highlighted), Developer, Settings, and Apps & Extensions. The main content area is titled 'Queries > Customer > Edit' and shows a query editor with the following conditions: 'Order Count is greater than 5 AND Last Order Date is greater than Jan 1, 2024 AND Last Order Date is less than Mar 31, 2025'. Below the editor, a 'Results' section shows 7 customers. A circular callout highlights the query conditions. The results table lists customer details including name, phone, email, loyalty status, order count, last order date, and LTV.

CUSTOMER	PHONE	EMAIL	LOYALTY	ORDERS	LAST ORDER	LTV
<input type="checkbox"/> HG Heather Green 6 Bottle Club	(714) 222-1111	heather@gmail.com	Loyalty Super Gold	28 Orders	Last Order Mar 1, 2024	LTV \$2,991.29
<input type="checkbox"/> CK Clark Kent	(785) 222-1111	clark.kent@commerce7.com	Loyalty Silver	12 Orders	Last Order May 23, 2024	LTV \$1,864.58
<input type="checkbox"/> OT Olivia Tucker 6 Bottle Club	(707) 259-9281	olivia.tucker@commerce7.com	Loyalty Silver	16 Orders	Last Order Dec 25, 2024	LTV \$2,099.97

They Build Complex Queries



Top 10%
6 Complex Queries



Top 25%
1 Complex Query



Median
0 Complex Queries

They Build Queries

Spectra Winery Admin Panel

Queries > Customer > Edit

Rose Purchasers (Email Campaign)

Conditions + Add Condition Group

- Customers for Orders that match these conditions Edit
- Customers that match these conditions Edit

Results 27 Customers

Search Customers

CUSTOMER	Details	Loyalty
<input type="checkbox"/> SA Sarah Anderson 6 Bottle Club		Loyalty Bronze 25 Orders Last Order Nov 20, 2023 LTV \$932.95
<input type="checkbox"/> AB Alex Baker 6 Bottle Club	alex@commerce7.com	Loyalty Gold 38 Orders Last Order Oct 29, 2025 LTV \$8,346.50
<input type="checkbox"/> BD Ben Dawson 6 Bottle Club	(250) 604-3123 ben.dawson@commerce7.com	Loyalty Super Gold 34 Orders
<input type="checkbox"/> JD Jane Doe	jane.doe@email.com	Loyalty Super Gold 34 Orders

Callout 1: Customers for Orders that match these conditions
Sku Purchased is equal to 2015Rose Edit

Callout 2: Customers that match these conditions
Last Order Date is greater than Aug 1, 2023 Edit

[Help Center](#)

They Segment Customers

They Believe In Data



Top 10%
88 Tags



Top 25%
44 Tags

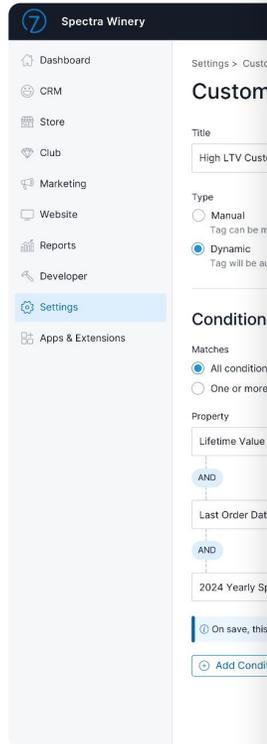


Median
20 Tags



Average
38 Tags

They Segment Customers



Settings > Customer Tags > Edit

Customer Tag

Title

High LTV Customers

Type

Manual
Tag can be manually applied

Dynamic
Tag will be automatically applied based on the conditions you set

Conditions

Matches

All conditions
 One or more conditions

Property	Condition	Value	
Lifetime Value	is greater than or equal to	\$ 5000.00	
AND			
Last Order Date	is greater than or equal to	Jan 01, 2025	
AND			
2024 Yearly Spend	is greater than or equal to	\$ 1500.00	

On save, this dynamic tag will back populate existing customers. This takes a few minutes and will apply this dynamic tag to all existing customers.

They Use WinePulse or Enolytics

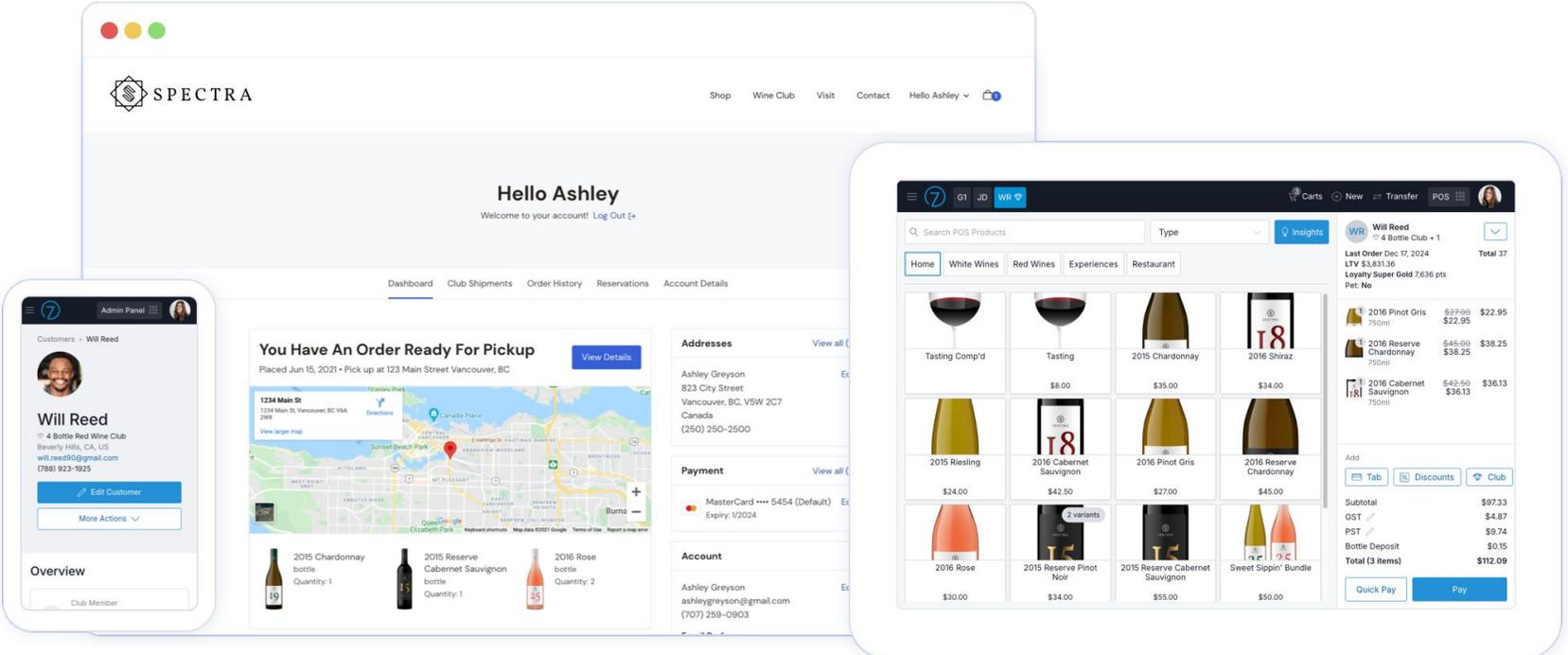
ENOLYTICS

110 wineries



246 wineries

They Embrace their DTC Platform



They Try New Things

Club Memberships > Jason Andres

Club Membership

More Actions ▾

Jason Andres
Manual Subscription
jason@commerce7.com
(778) 347-7874
Welland, ON, CA

157
Wineries enabled
Churn Prediction

Membership: Subscription Club (Apr 9, 2024)

Status: Active (2 Years Ago)

Churn Prediction: 53%

Get To Know Gui

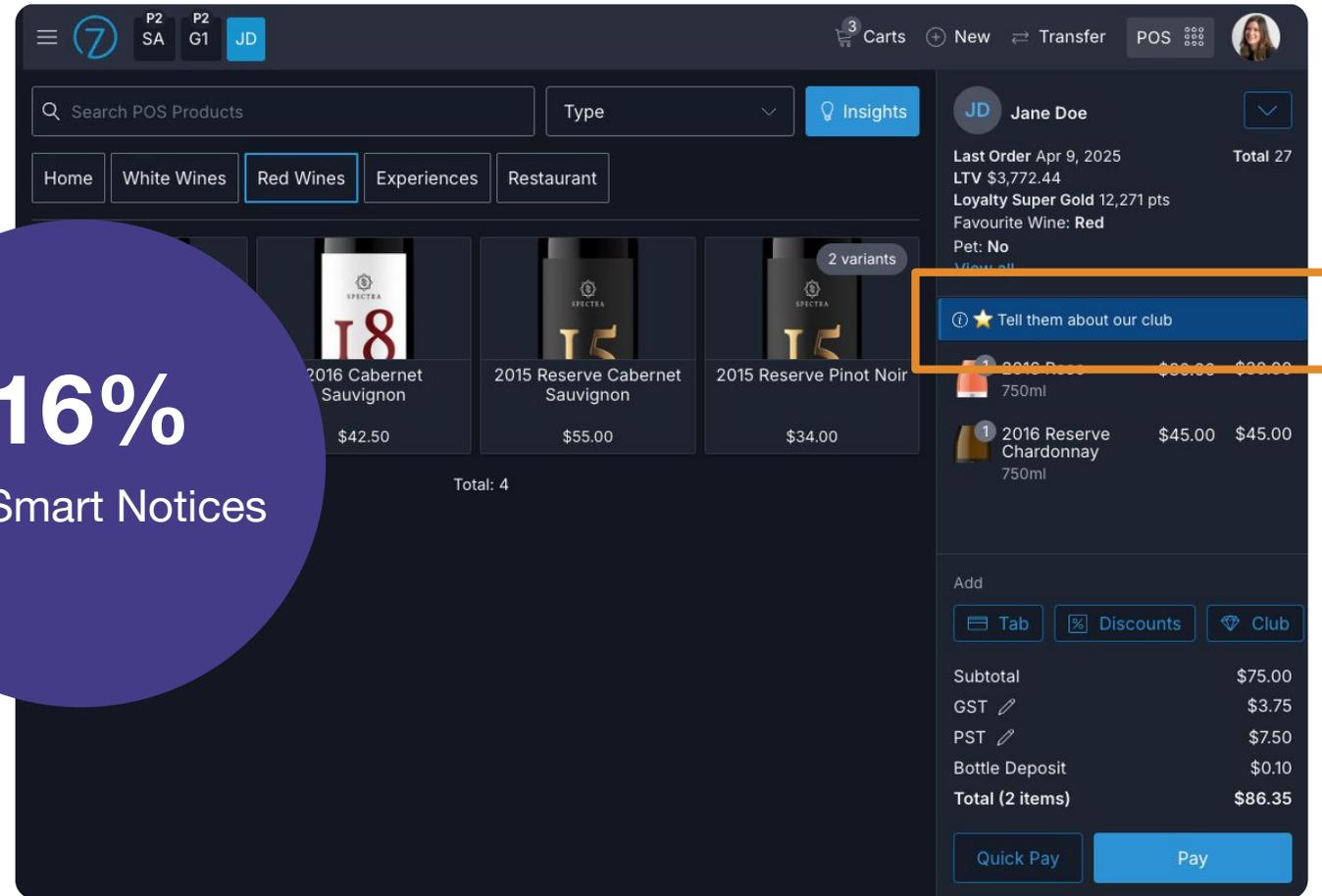
They prefer Chardonnay (45%), Cabernet Sauvignon (27%), and Riesling (9%). They enjoy fruity flavours, and tend to purchase bottles in the \$20-\$49 range.

Gui has visited us once before in April 2025.

125
Wineries enabled
AI Insights

They Prompt Their Staff

16%
Use Smart Notices



They Prompt Their Staff



Top 10%
2 Notices



Median
0 Notices



DIRECT TO CONSUMER
WINE SYMPOSIUM
FREE THE GRAPES

Closing

