DIRECT TO CONSUMER
WINE SYMPOSIUM
FREE THE GRAPES

Inside the Top 10%

Exploring the data from 3500 wineries at Commerce7

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Is the sky falling?

Can we beat it?

Powering 3500 Wineries

Commerce7

MARK ANTHONY
Wine & Spirits
EST. 1972

OPUS ONE

William Chris
VINEYARDS

CAYMUS
VINEYARDS

EST. 1896
PAUL
CLÜVER
FAMILY WINES

Anno 1893
CEDERBERG
SOUTH AFRICA

Gallo
FAMILY
Vineyards

HARLAN ESTATE

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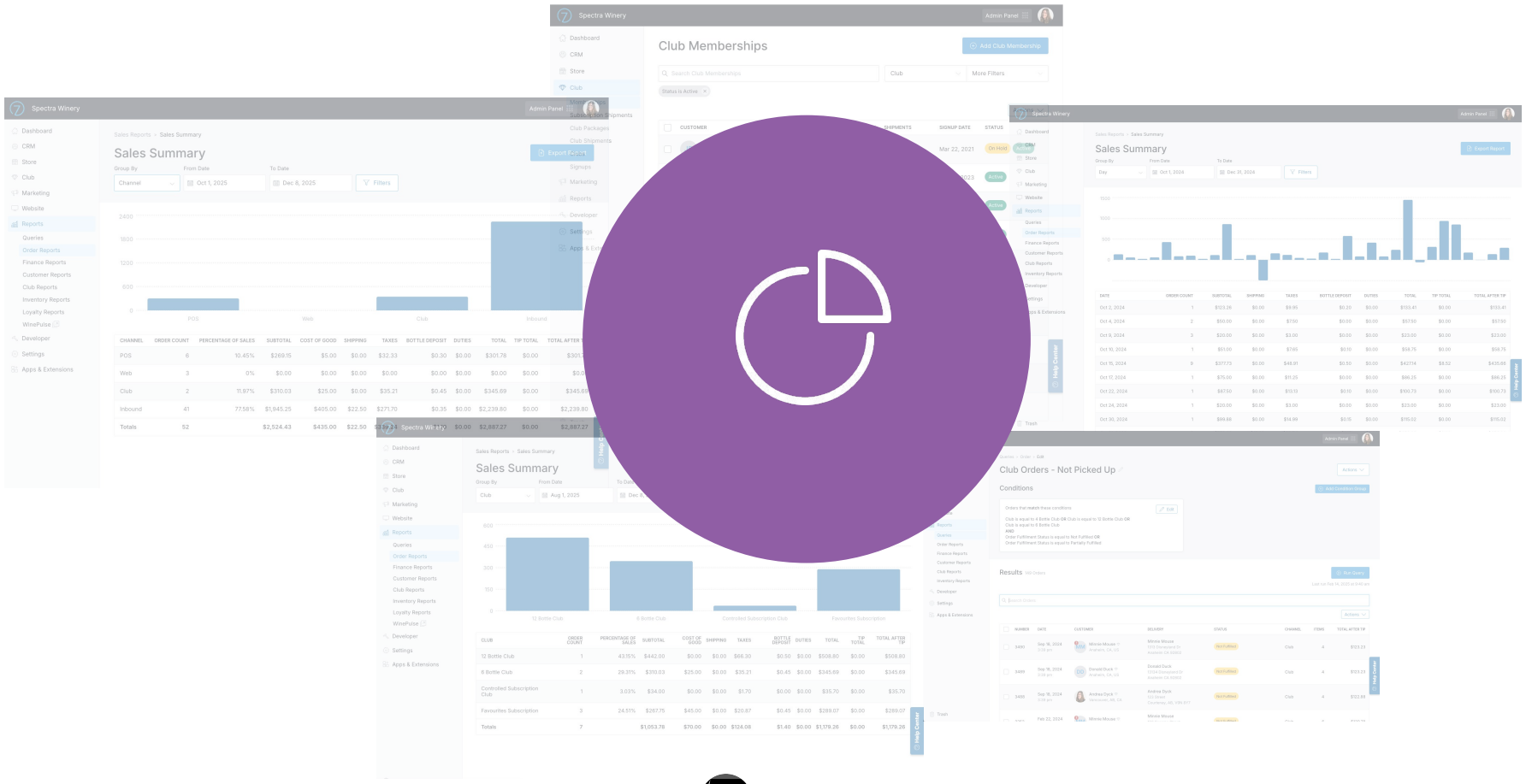
Data Can Be Misleading



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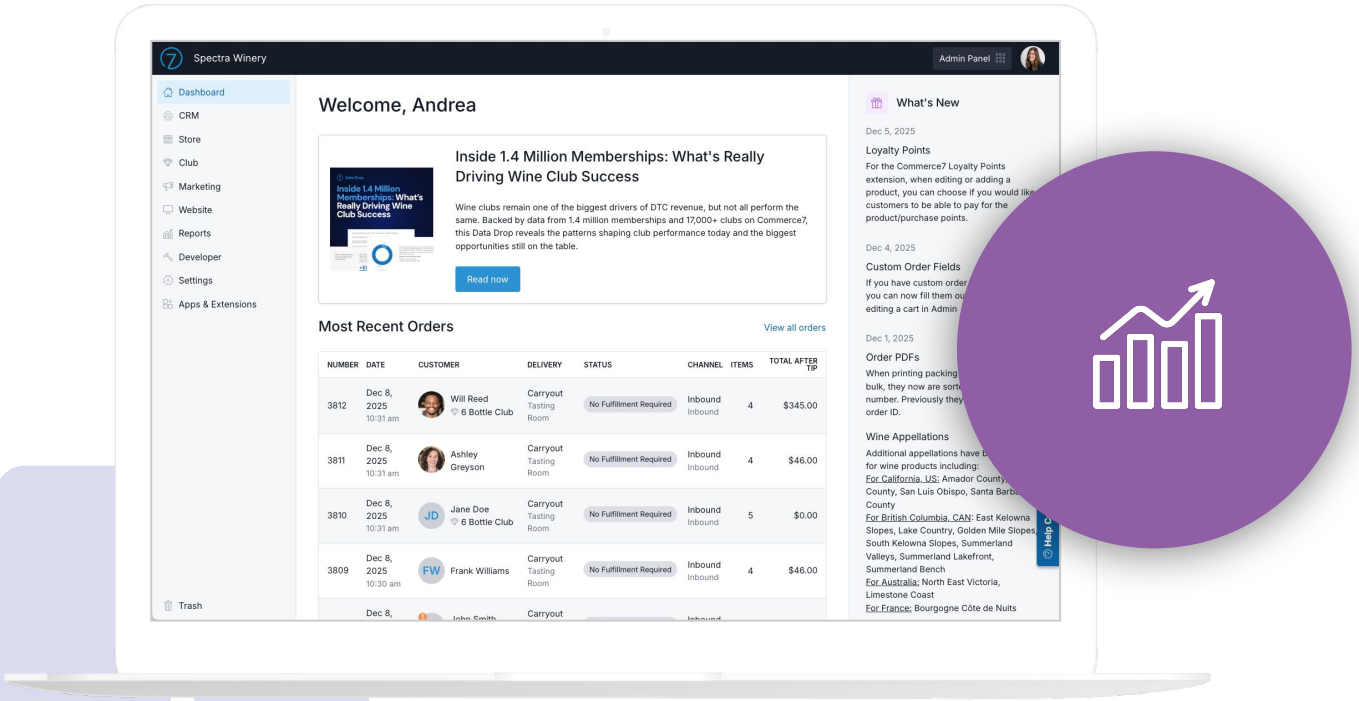
Beating the Trend



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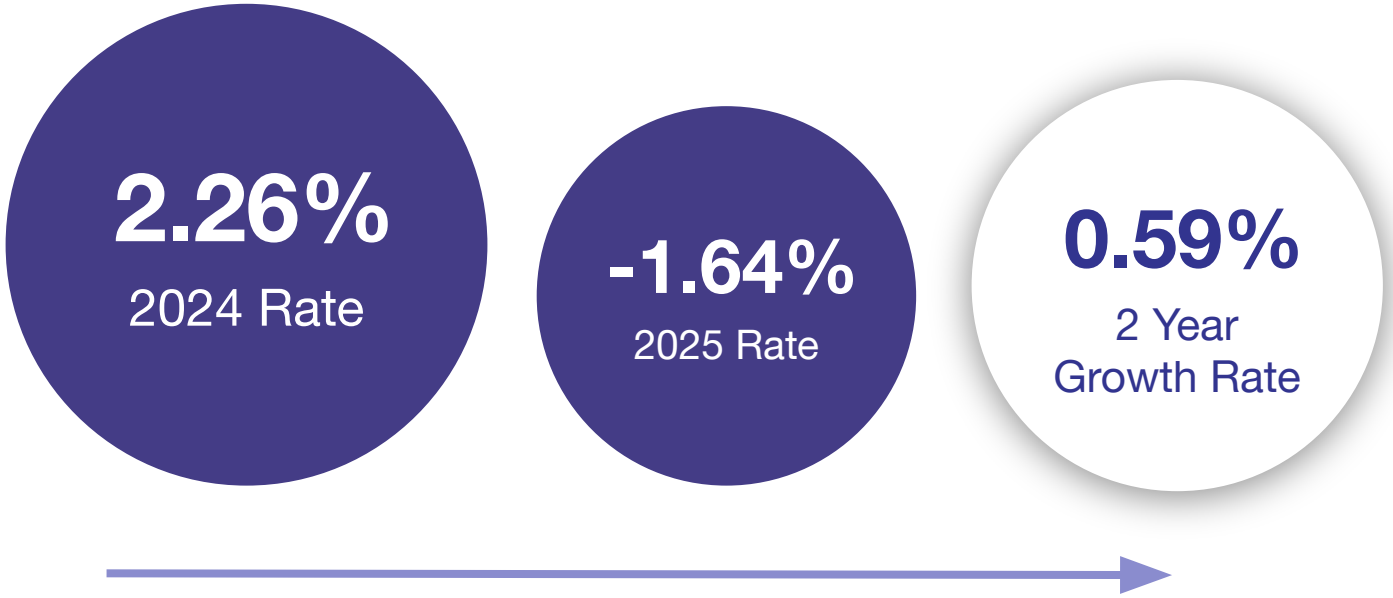
The Broad Picture

Overall Growth



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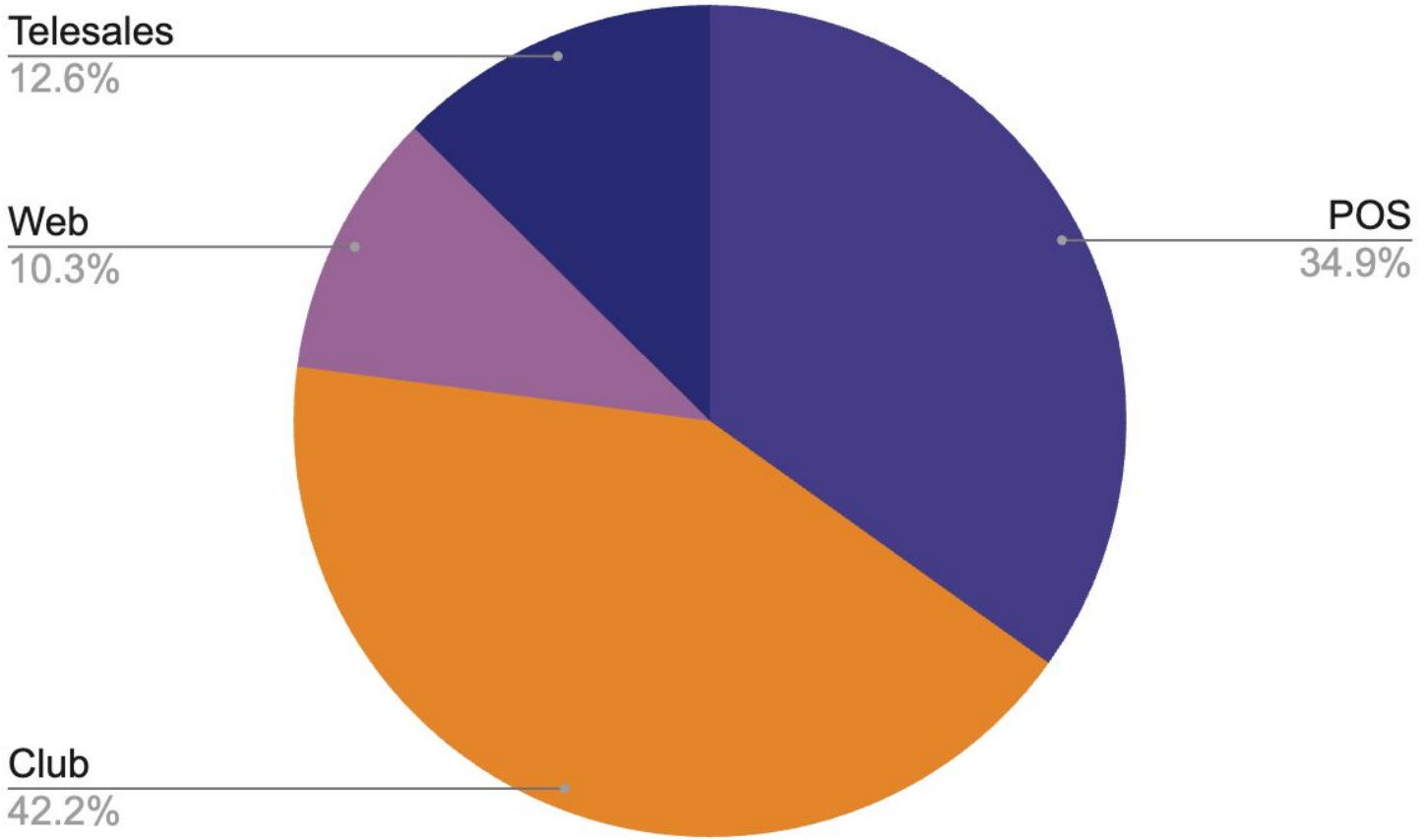
How Wine Is Sold DTC

By Dollars



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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%

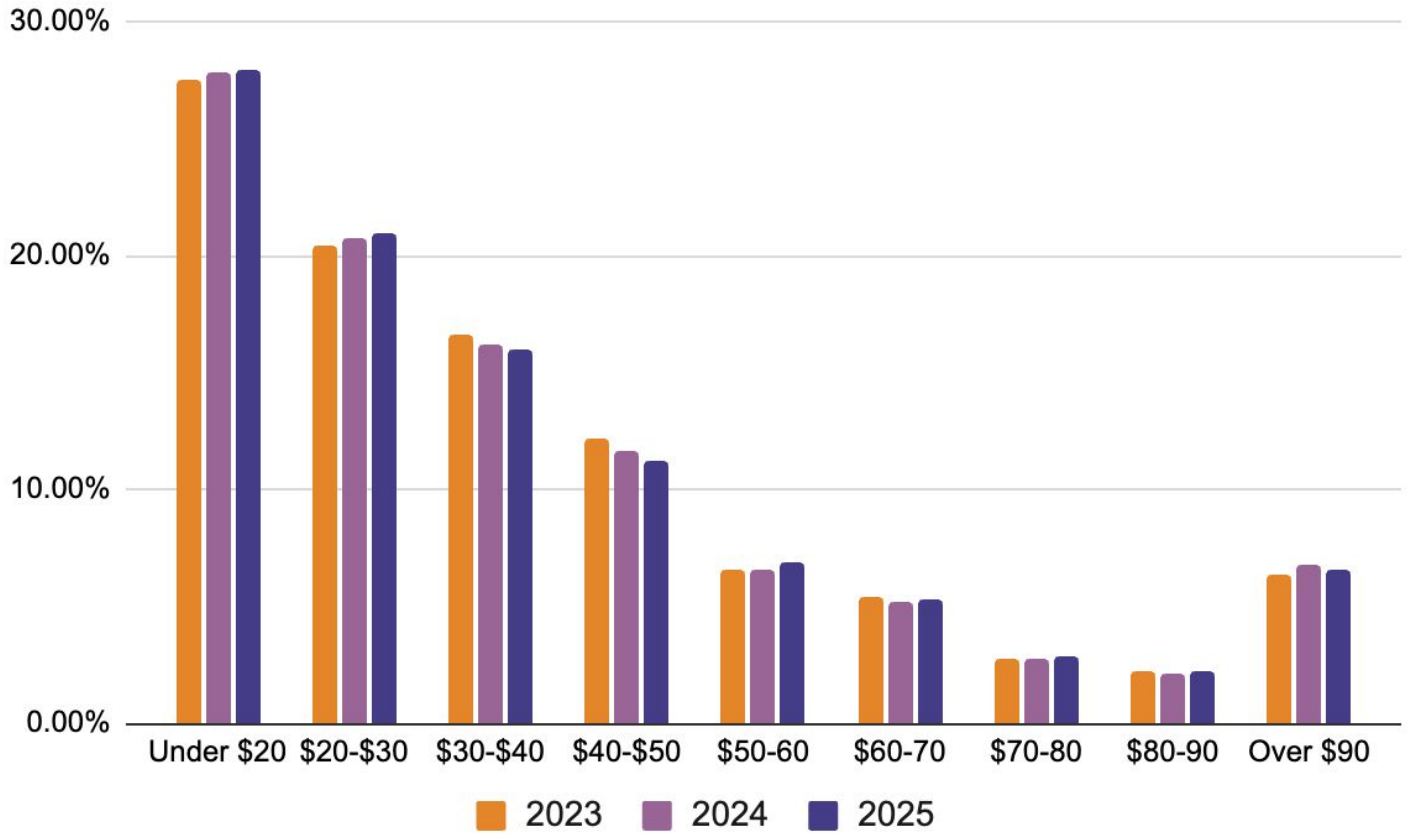
Percentage of Sales
By Cases

	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



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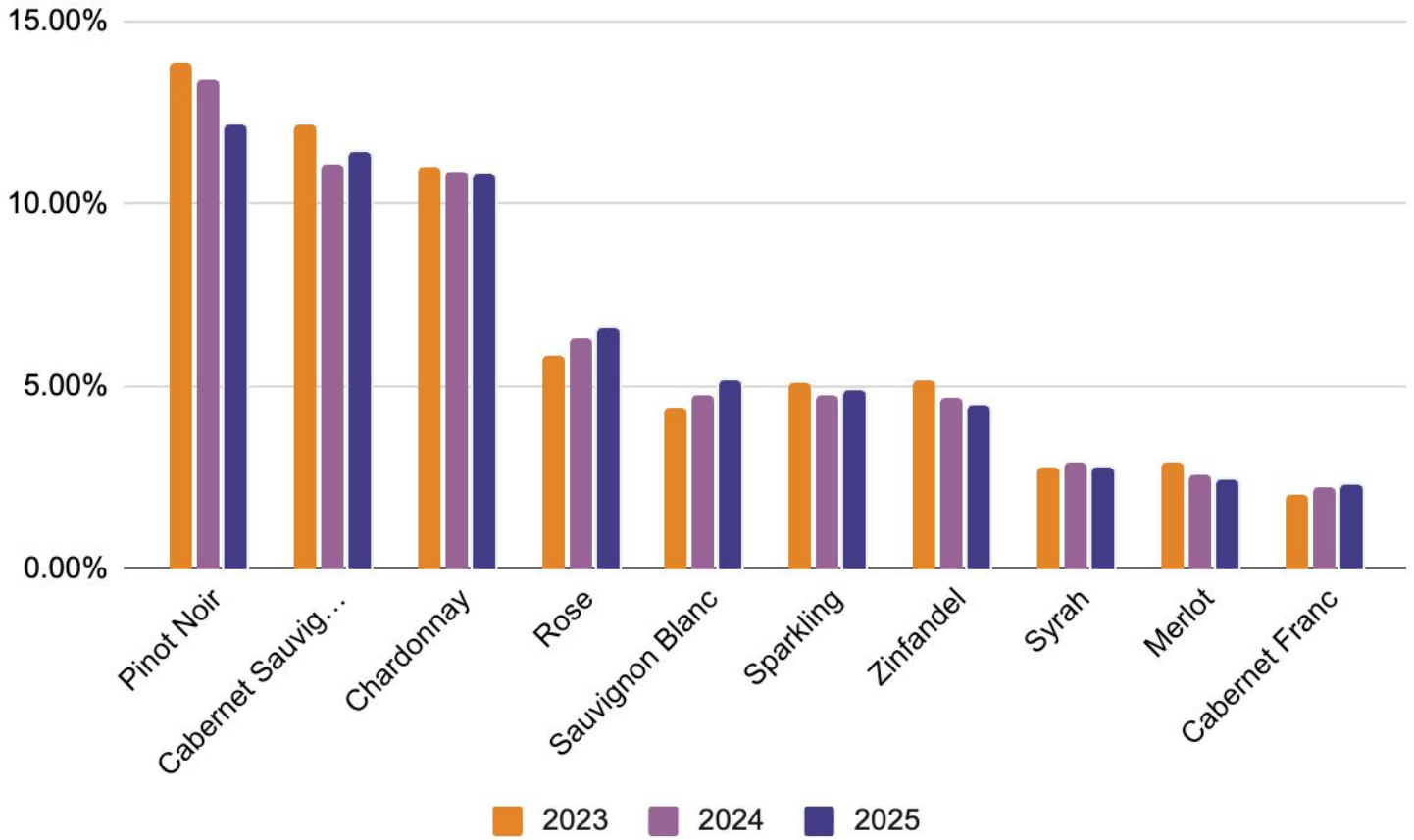
Sales By Price Point

	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



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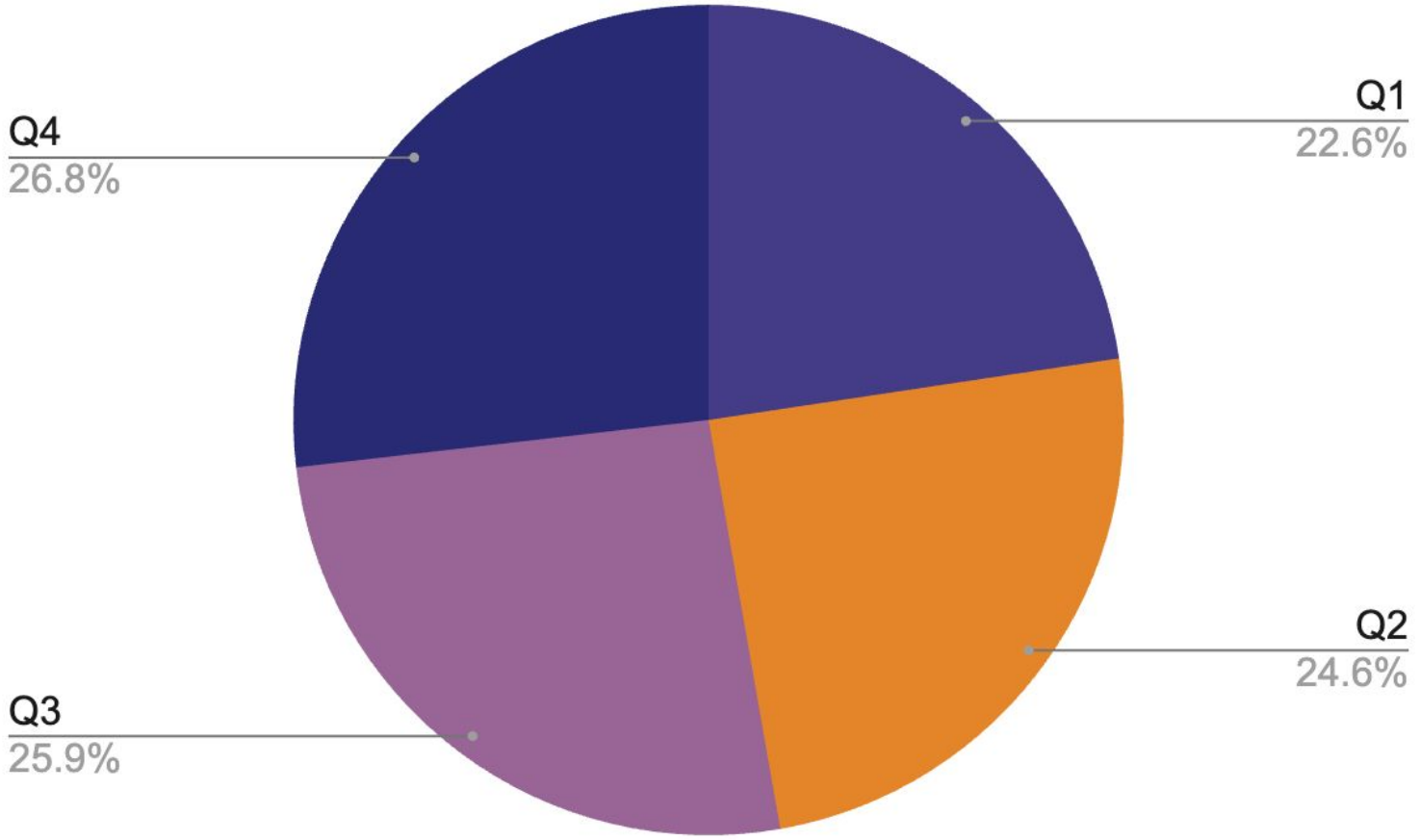
Sales By Varietal

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



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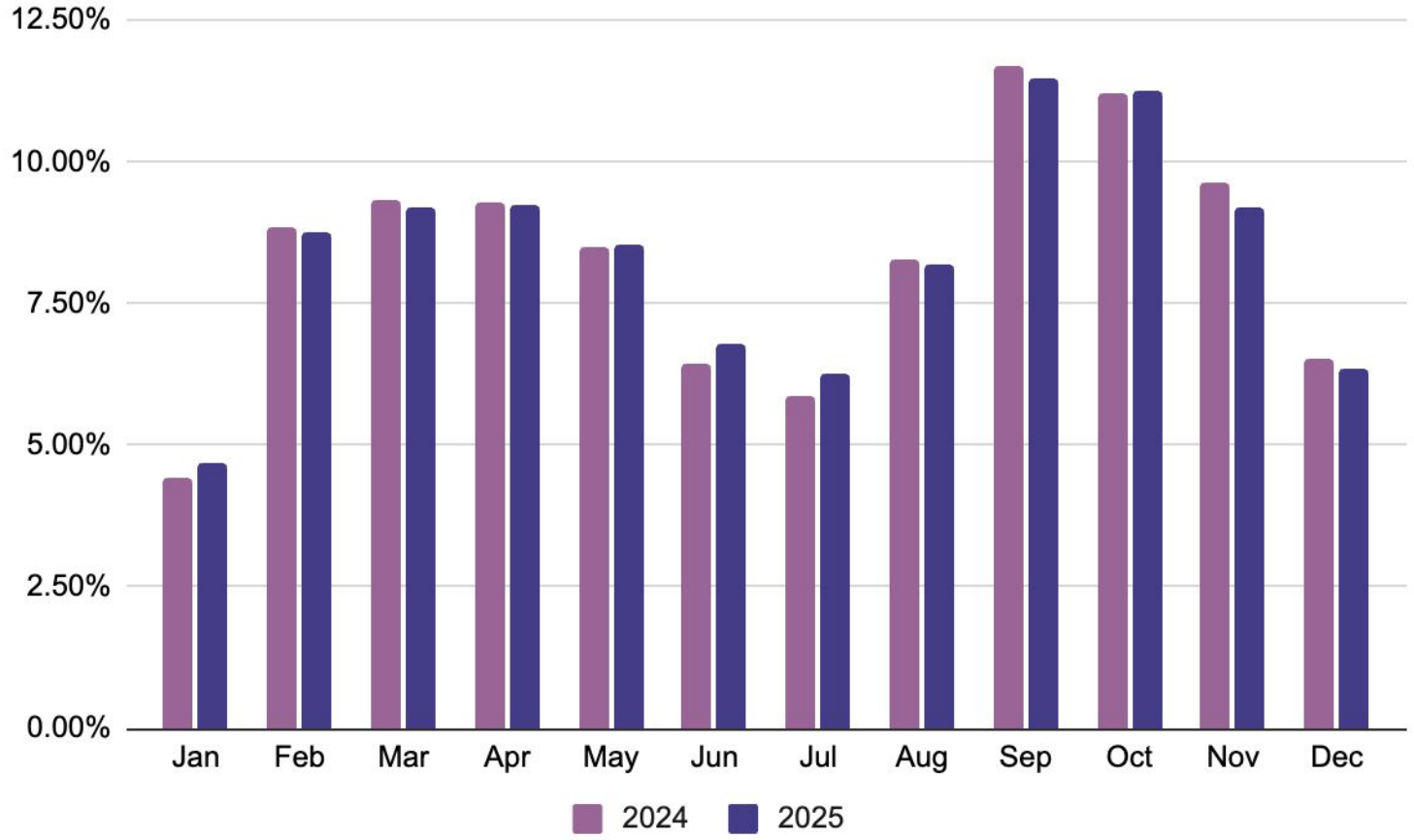
Sales By Quarter

	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



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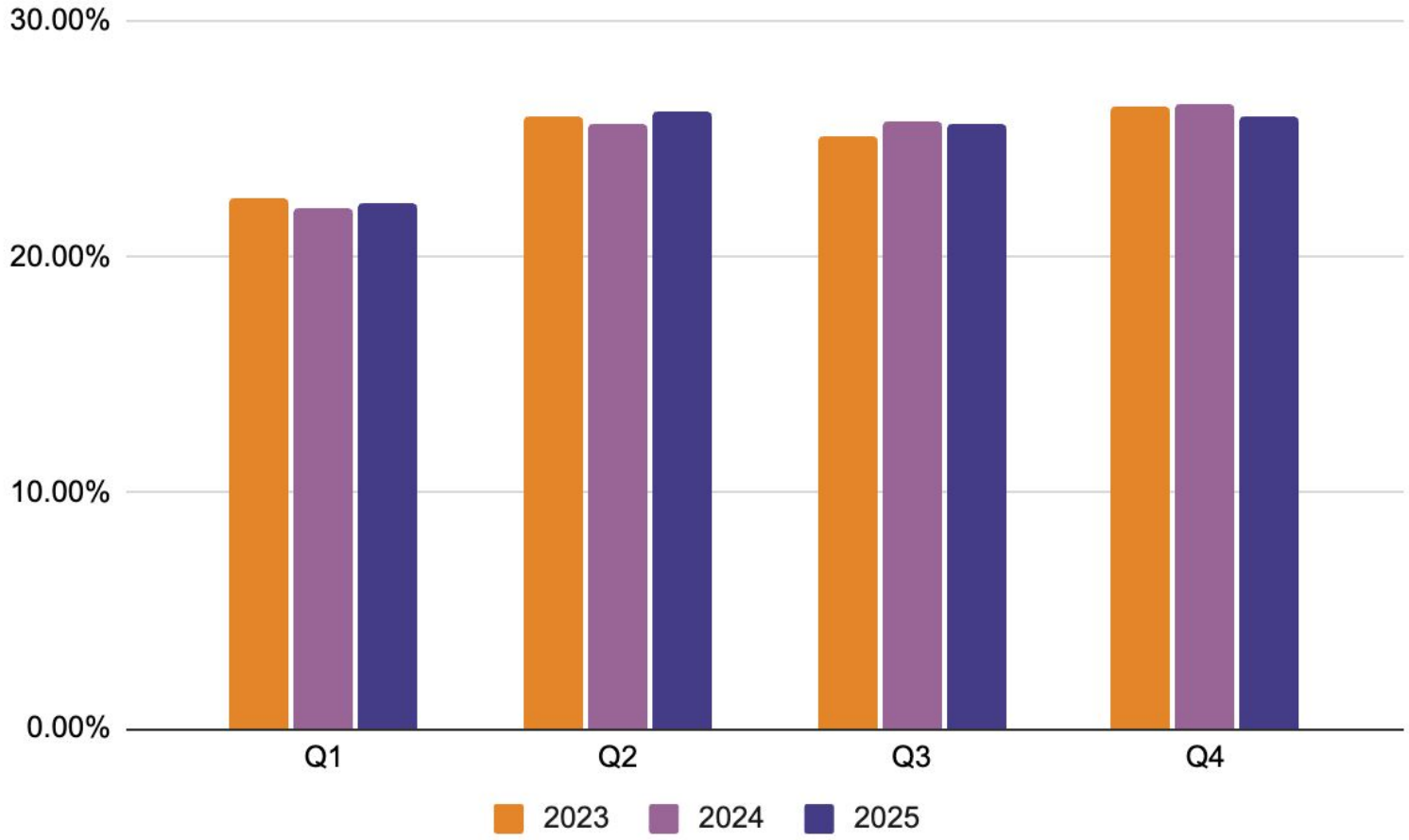
Sales By Month

	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



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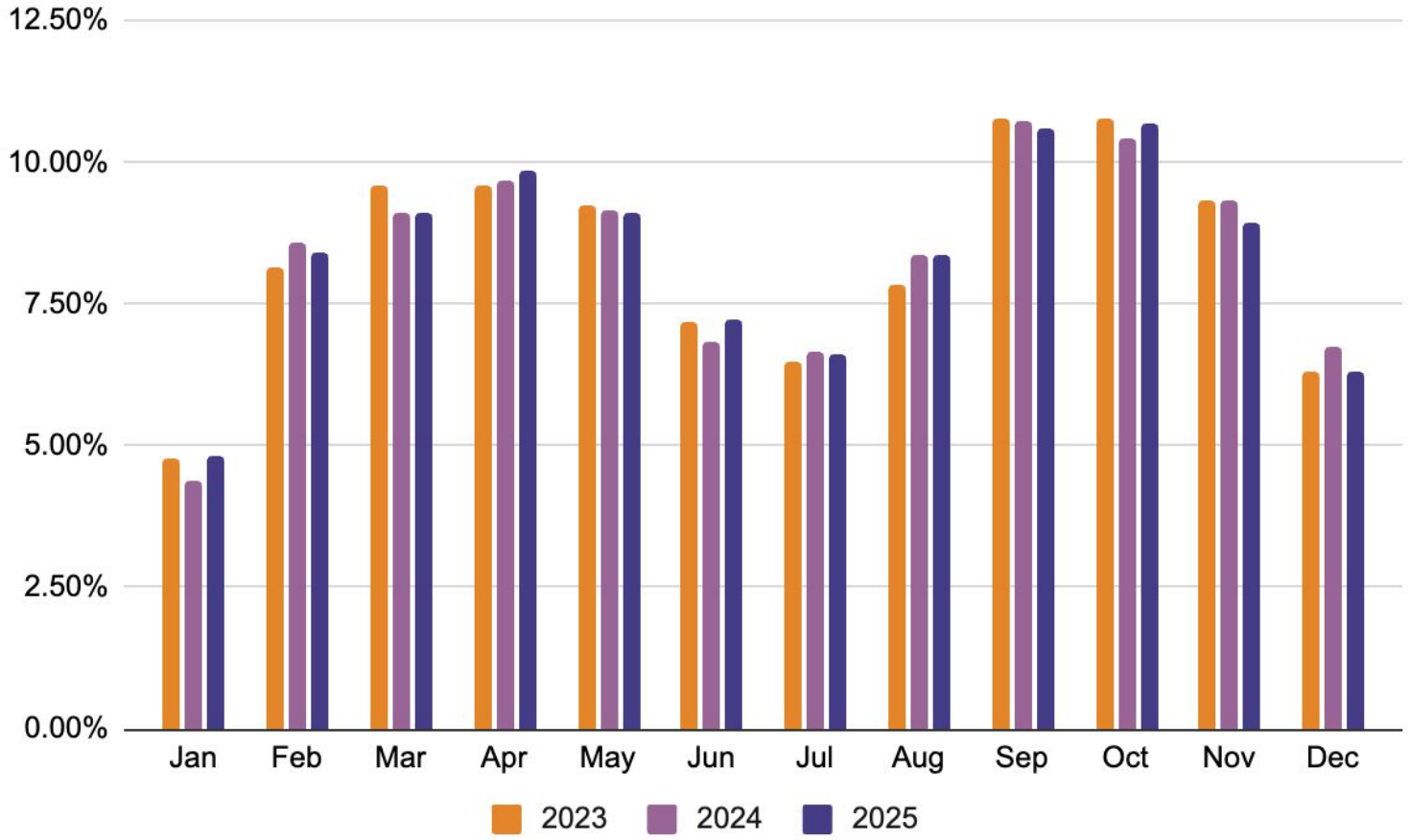
Cases By Quarter

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



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Cases By Month

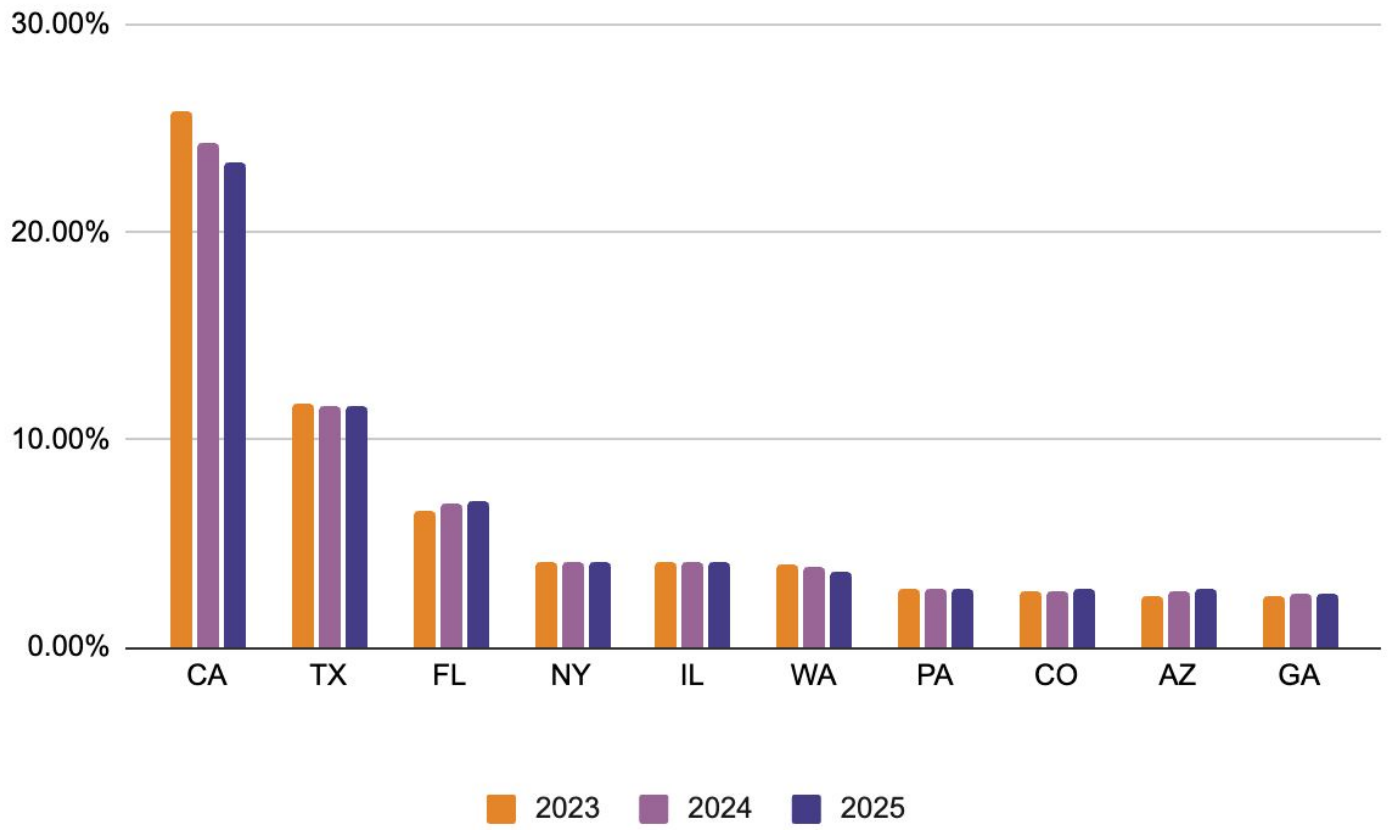
750ml Only

	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	45.93%	46.65%	27.89%
Pickup			19.80%
Ship	54.07%	53.35%	52.30%

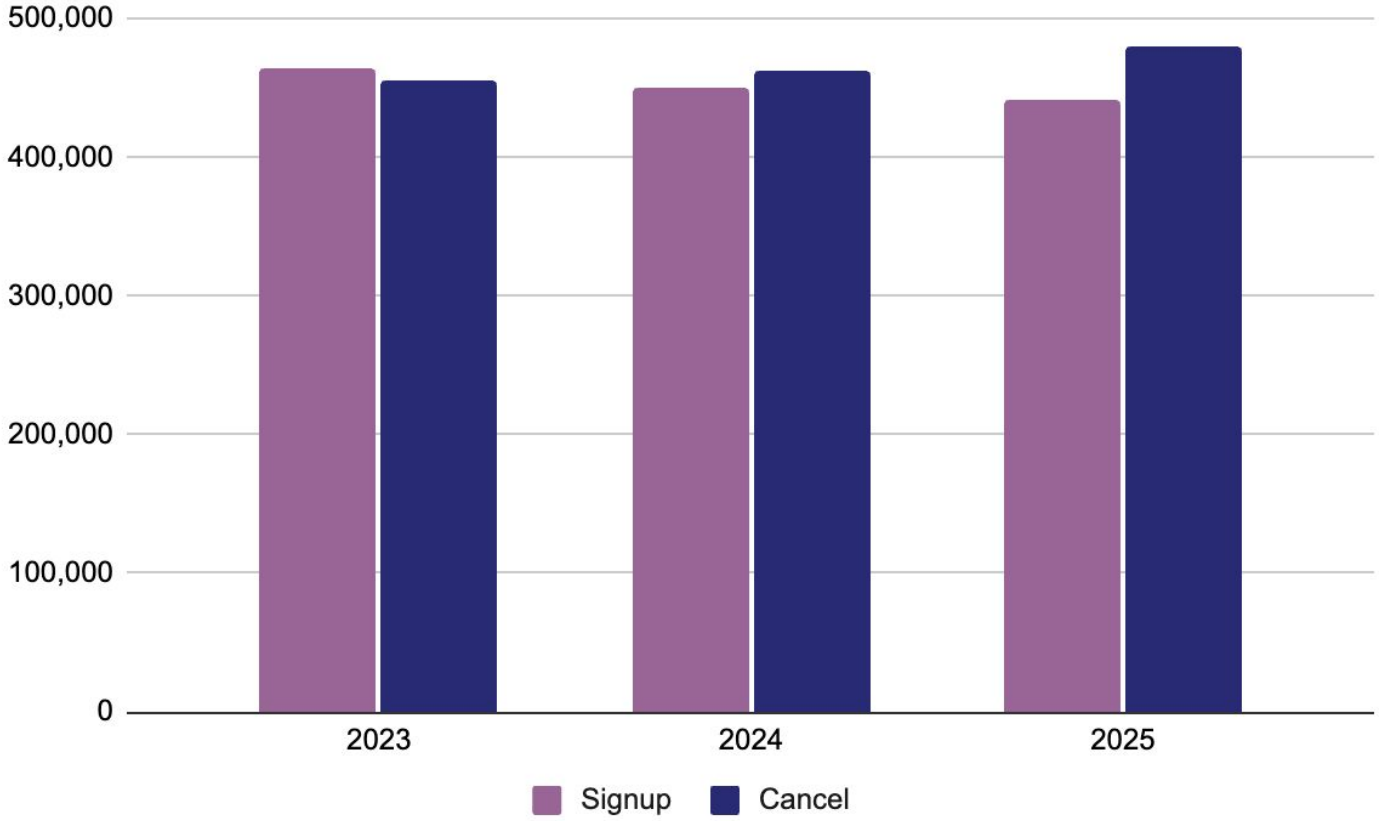
Sales By Ship State



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



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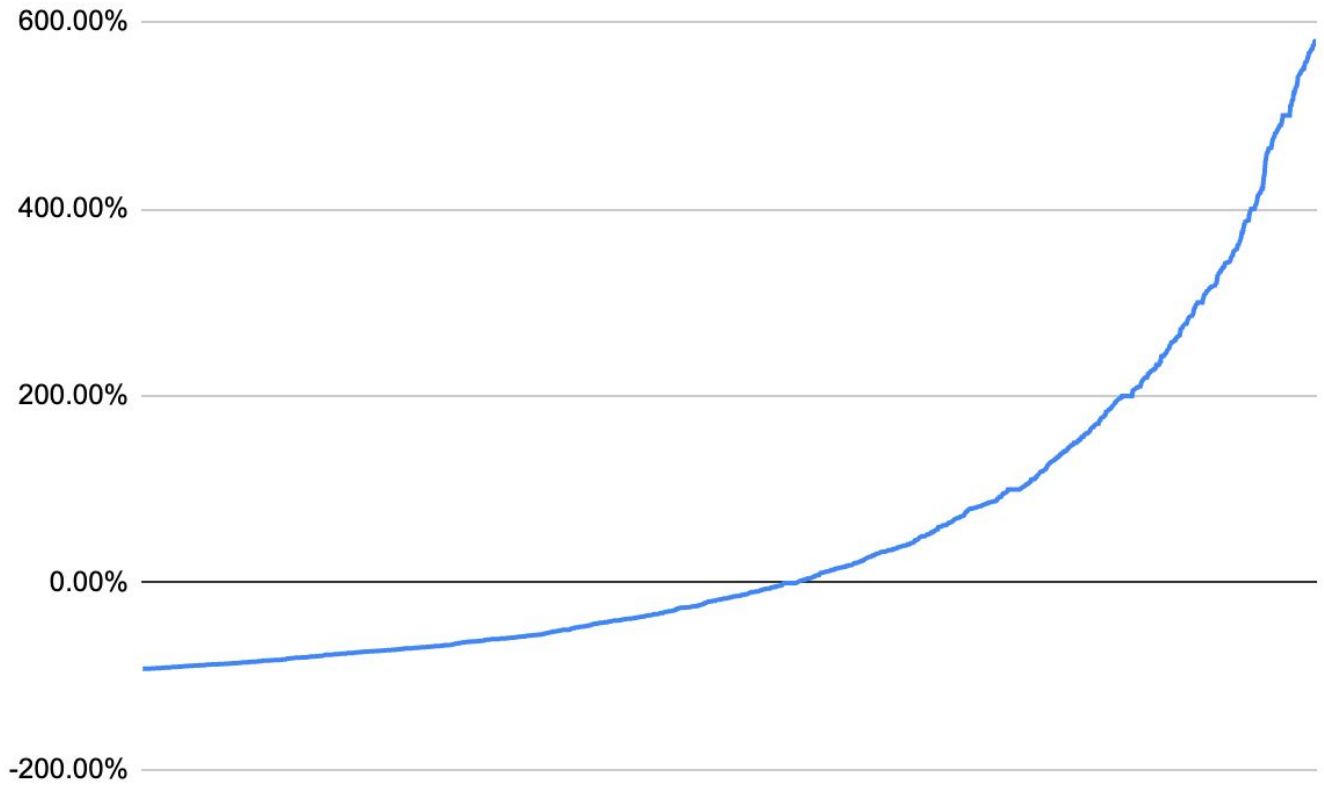
Club Growth

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

Club Growth By Winery

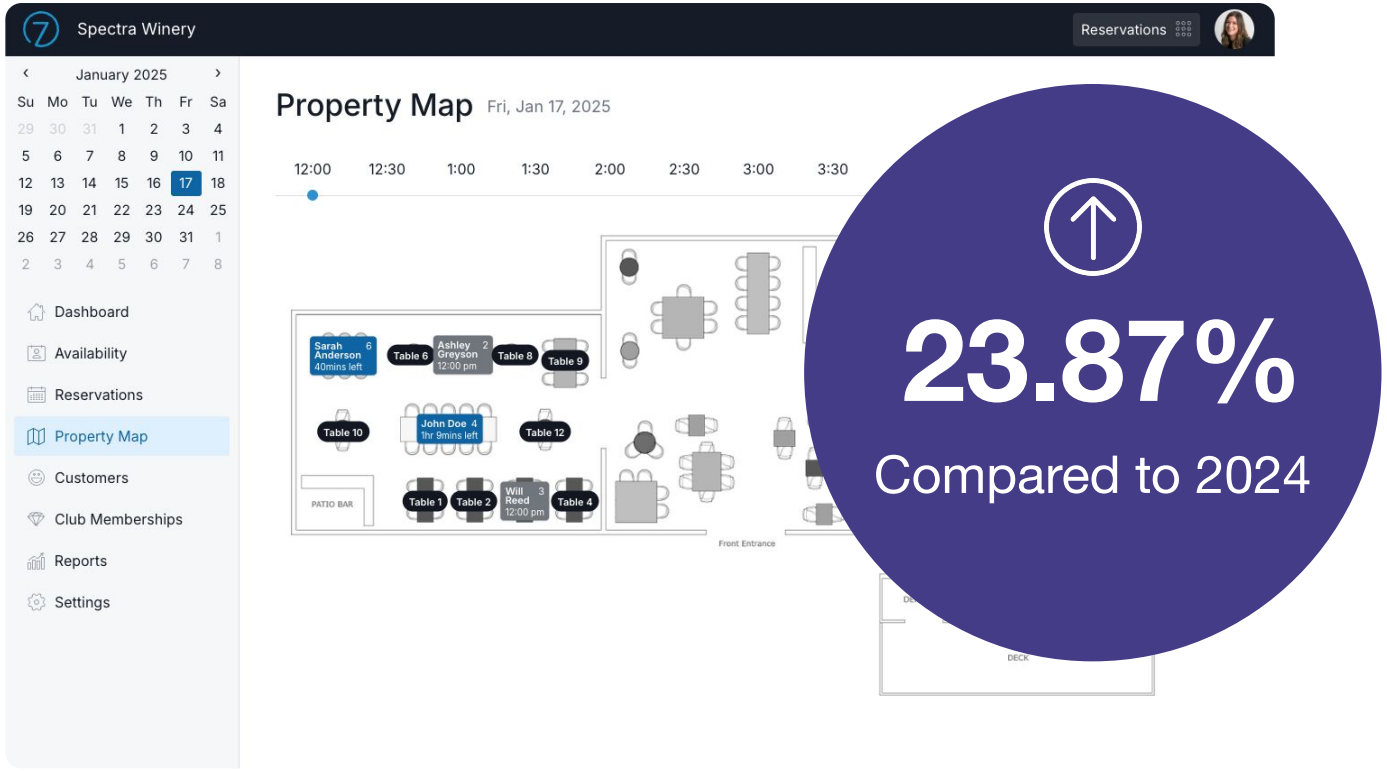


3500 Commerce7 wineries.

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

Reservation Growth

Doesn’t match to Napa



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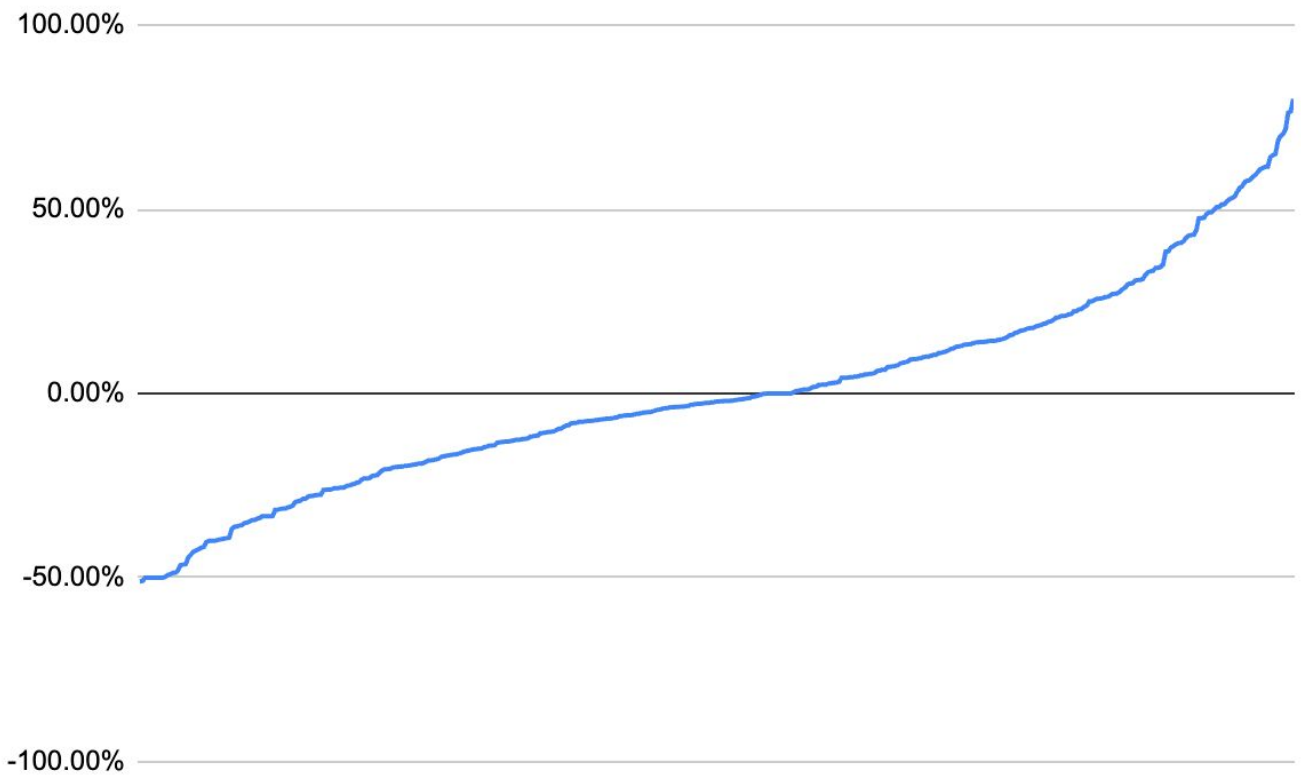
Reservation Growth By Winery



3500 Commerce7 wineries.

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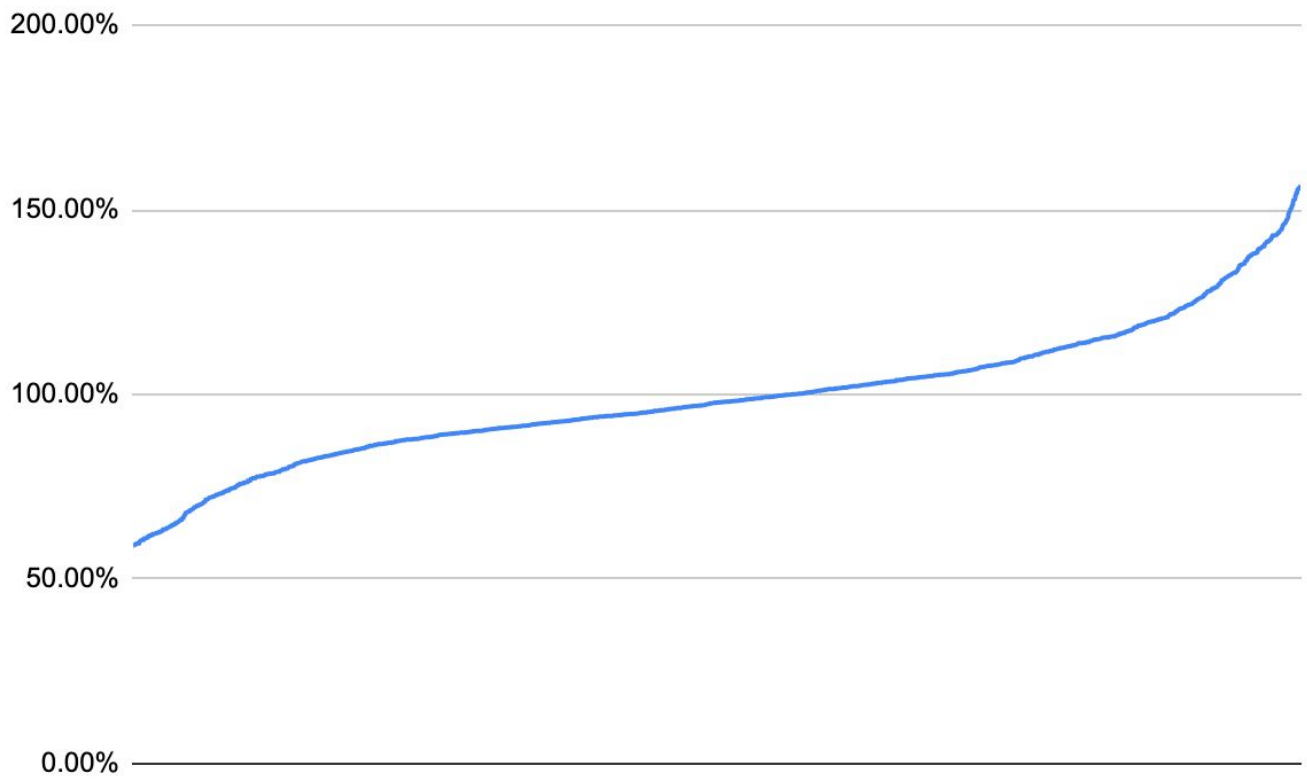
Overall DTC Growth By Winery



3500 Commerce7 wineries.

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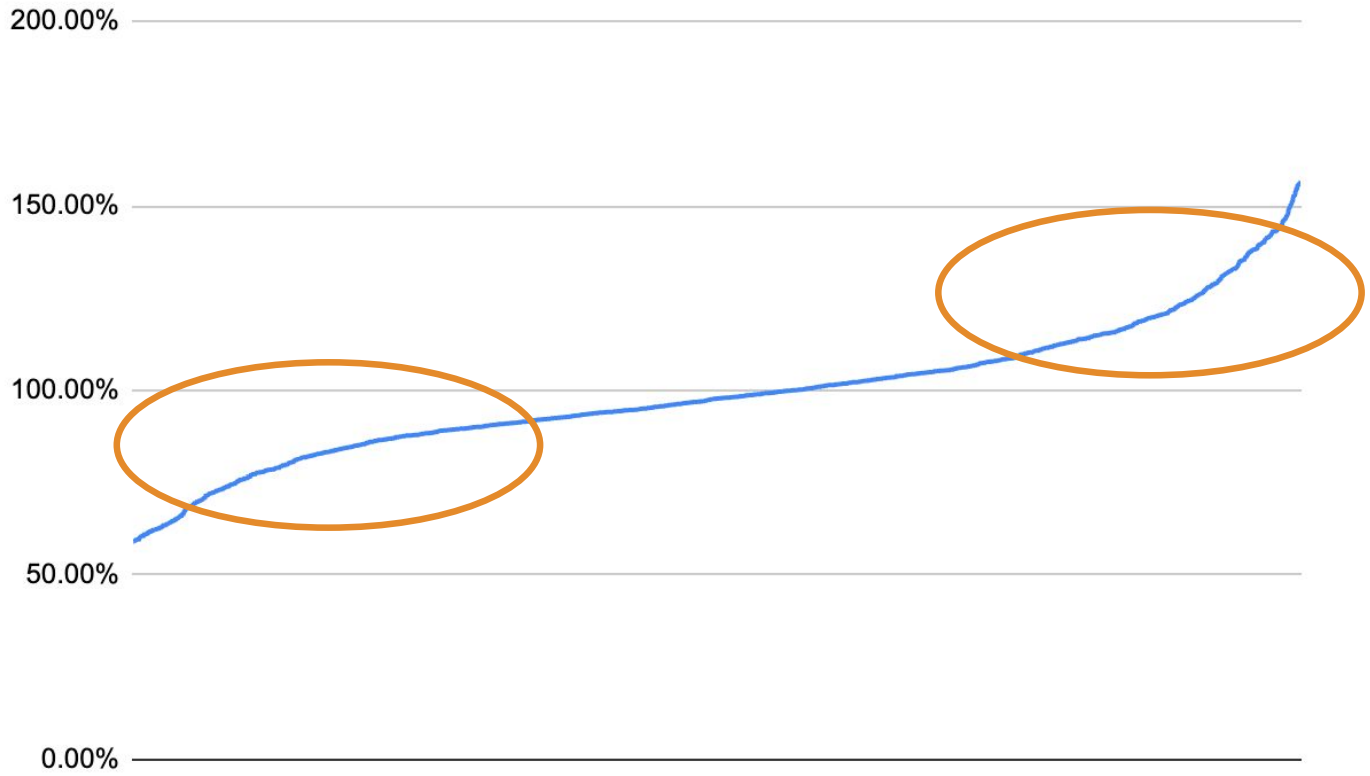
What is the right doing different than the left?



3500 Commerce7 wineries.

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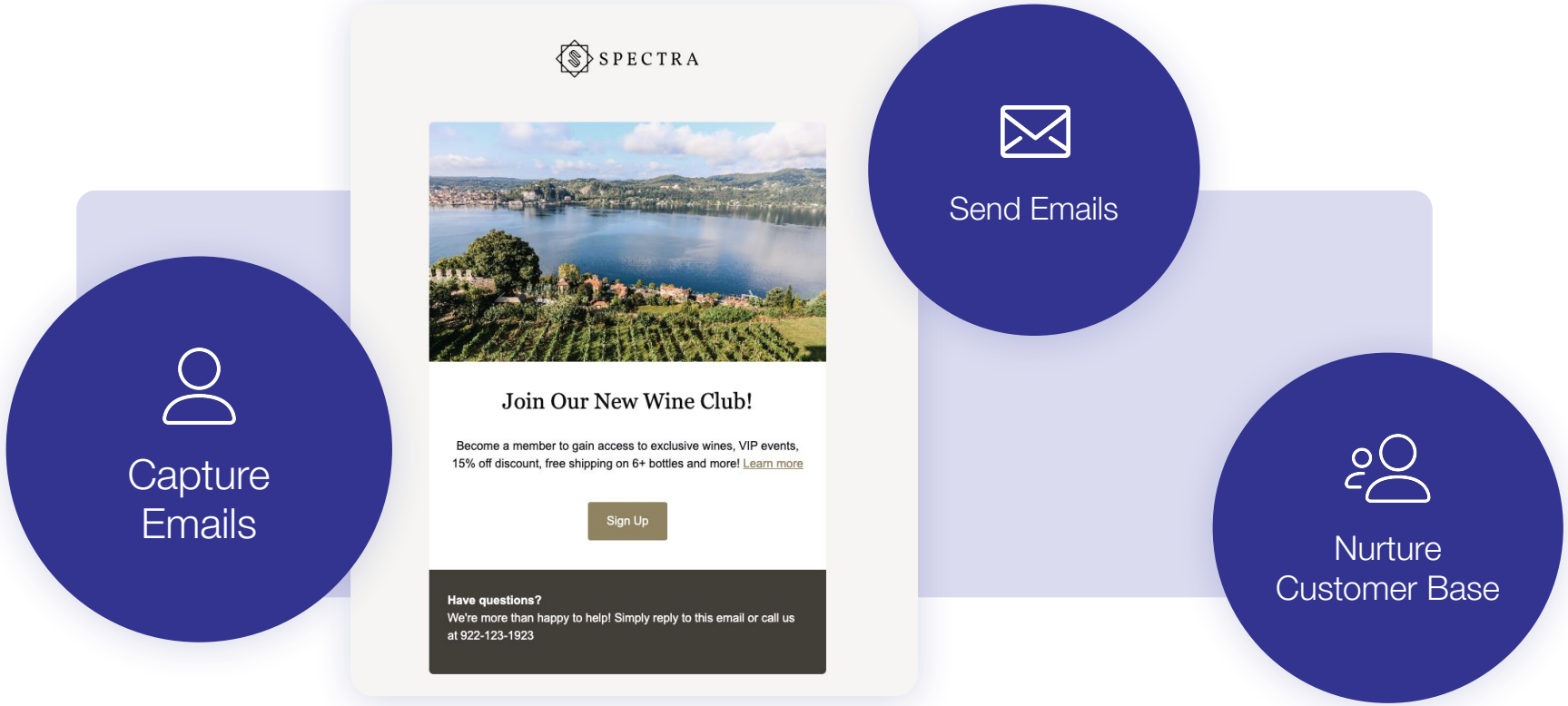
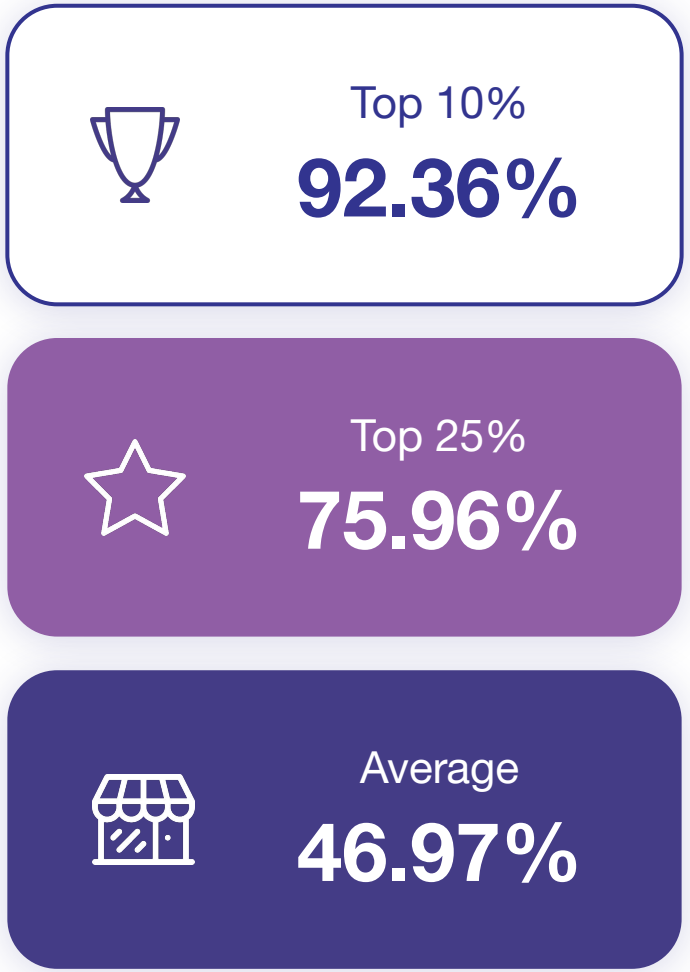
The Top 10%

They Dial in the Basics



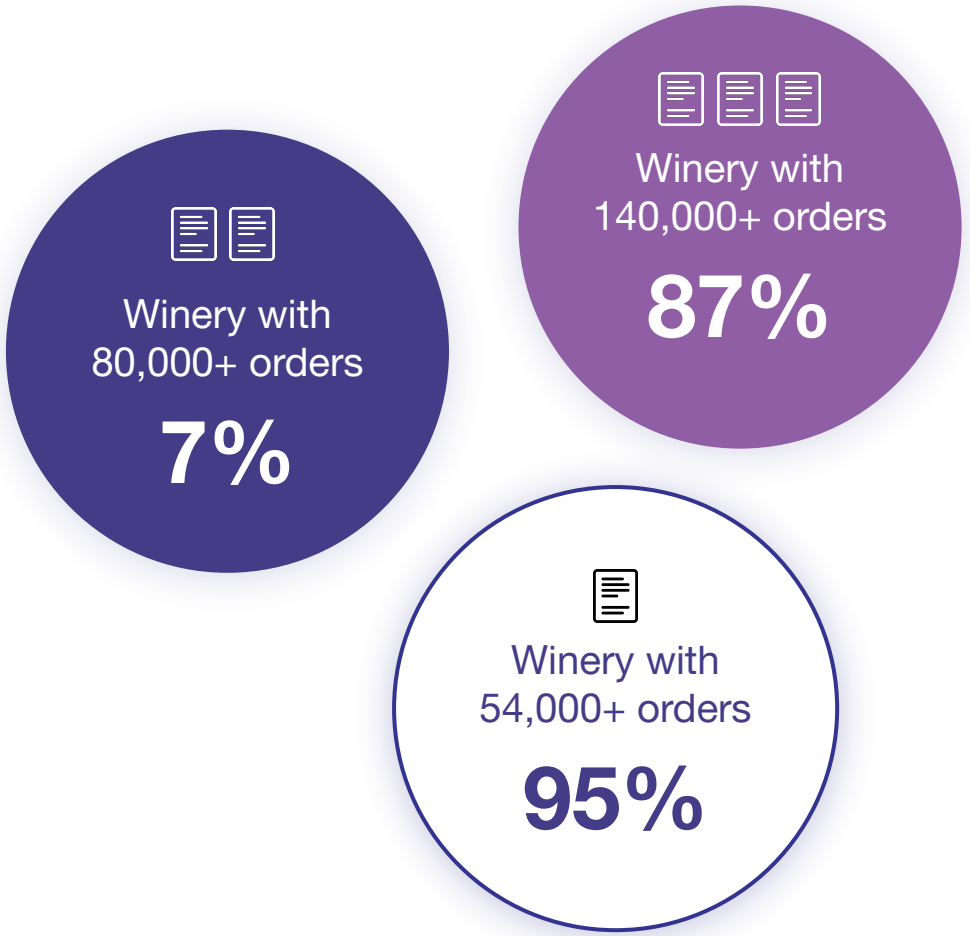
They Capture Email Addresses



*Wineries with 100+ POS orders

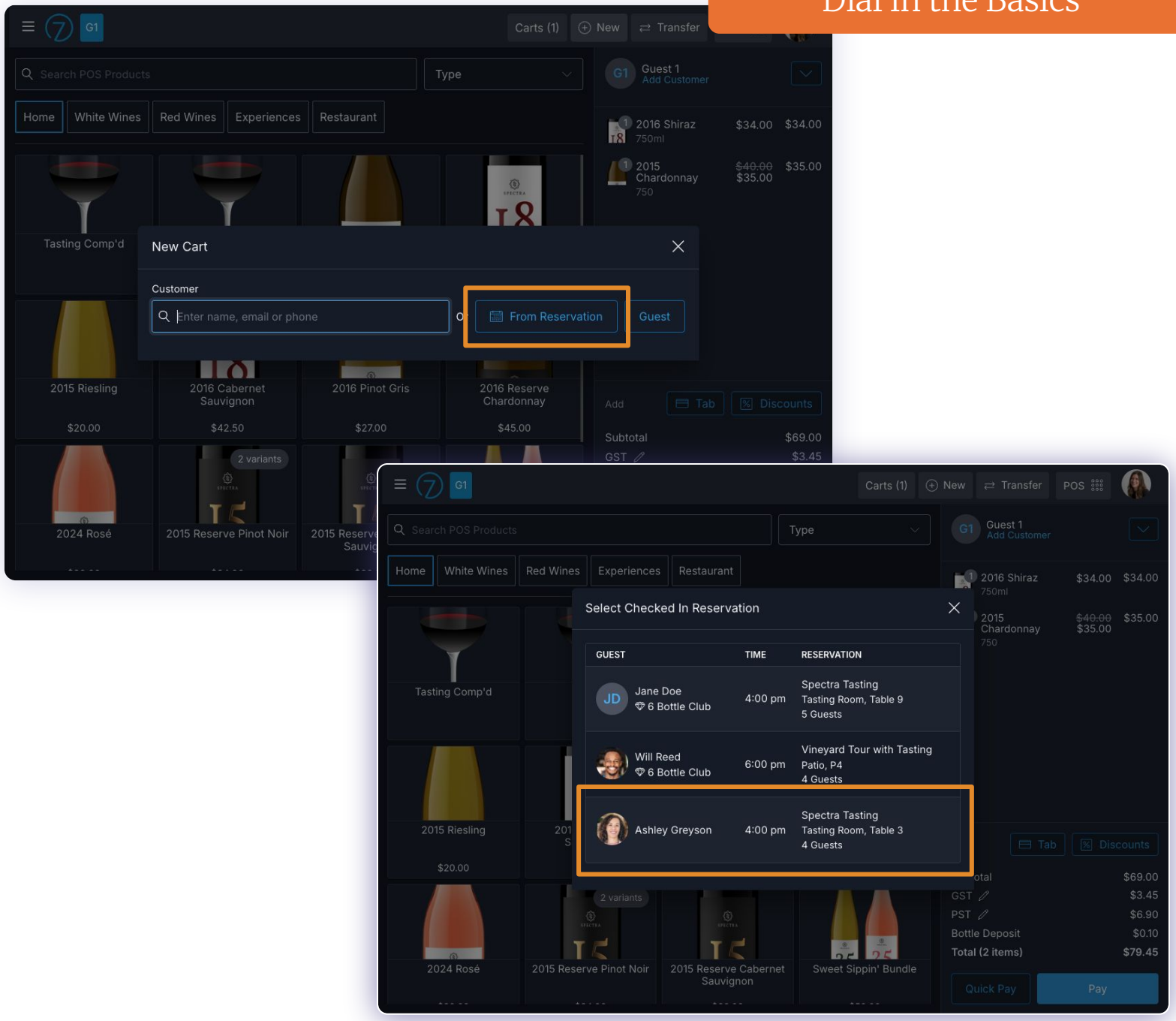
They Capture Email Addresses

Email capture rate



They Capture Email Addresses

Idea #1. Link your reservation data



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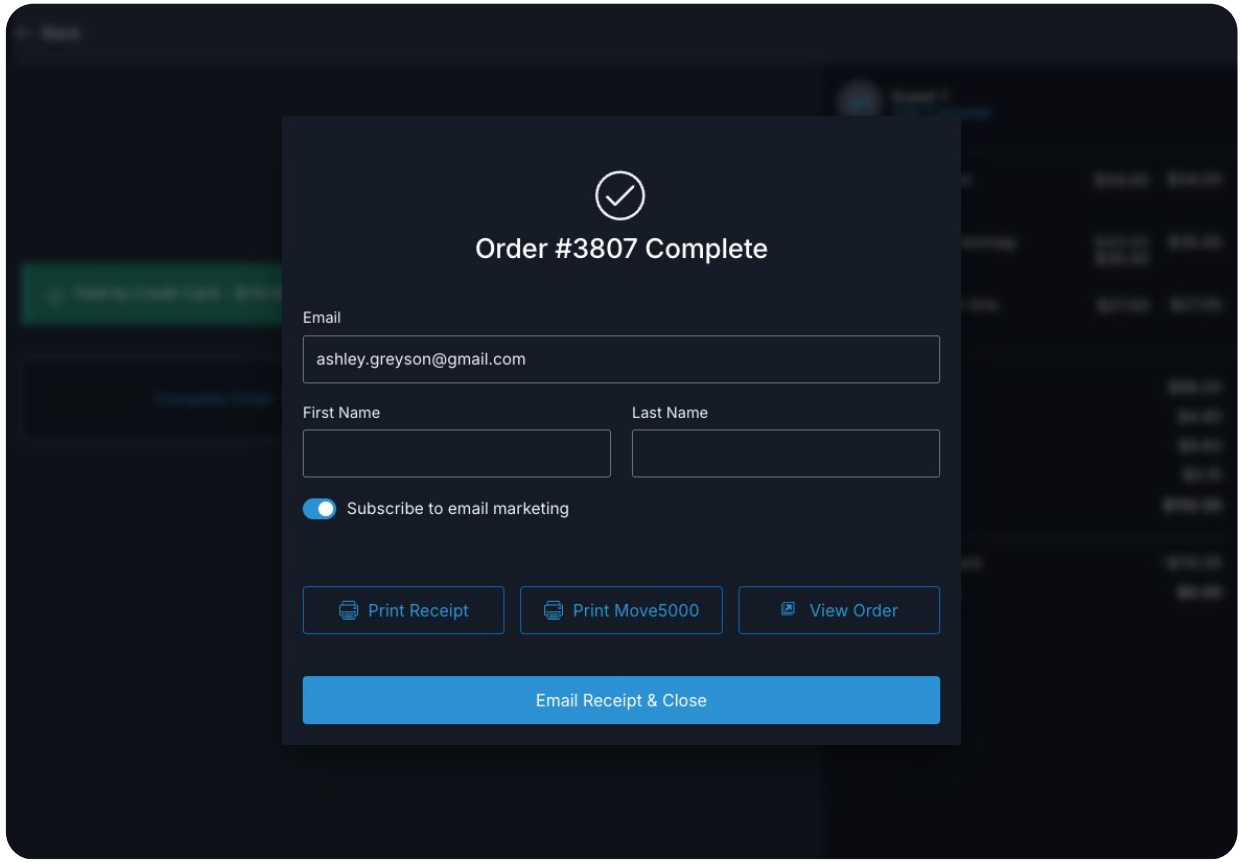
They Capture Email Addresses

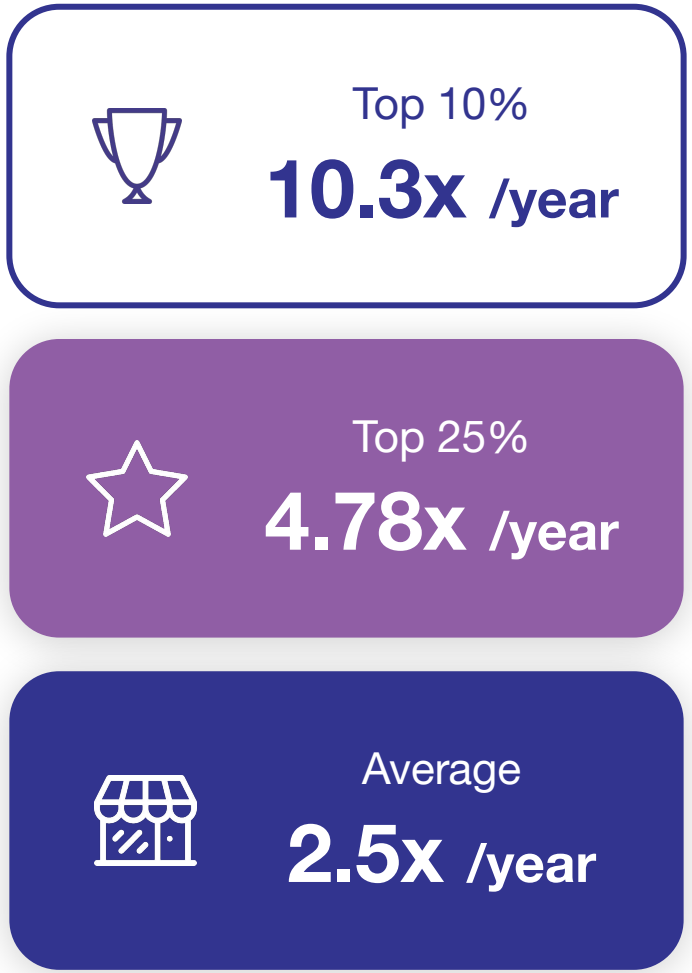
Idea #2

"How was your experience today?"



They Send Emails

Emails sent vs number of customers



*Wineries who use Commerce7 as the primary campaign tool

They Communicate With Customers

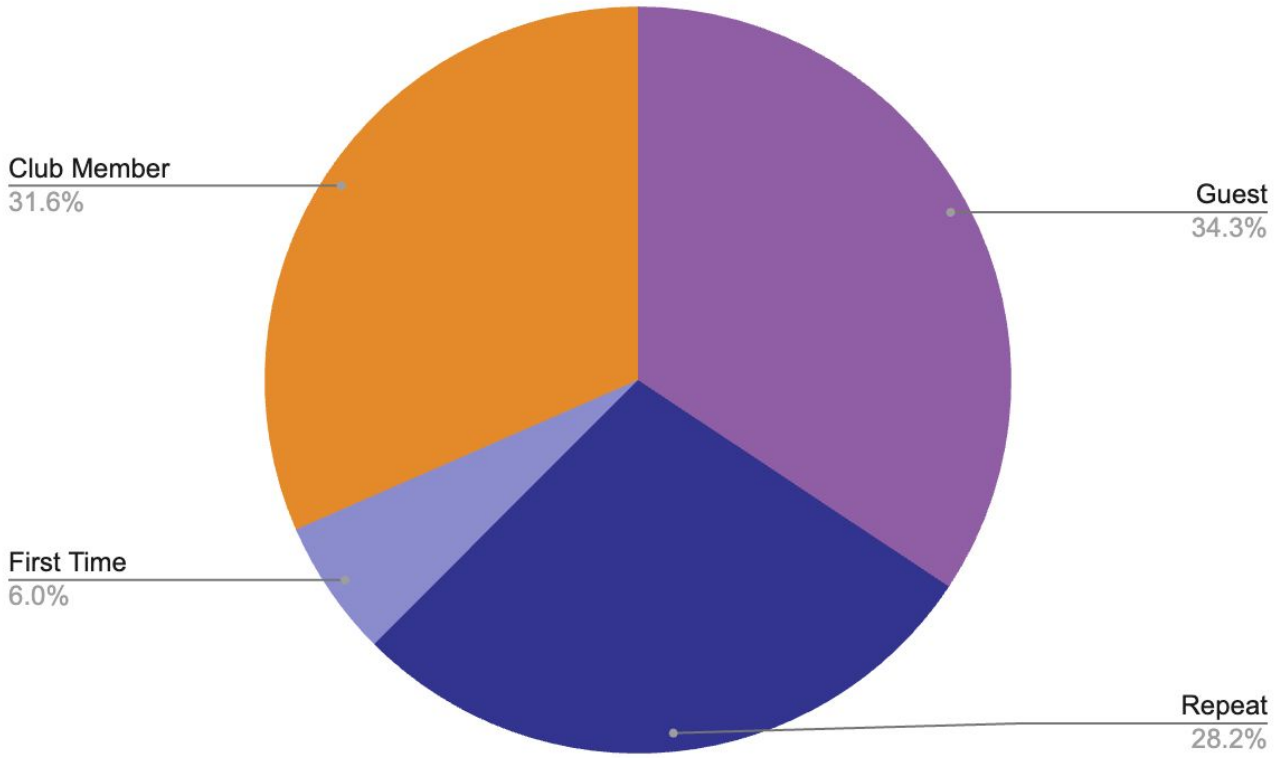
Commerce7
888 wineries

mailchimp
571 wineries

redchirp
469 wineries

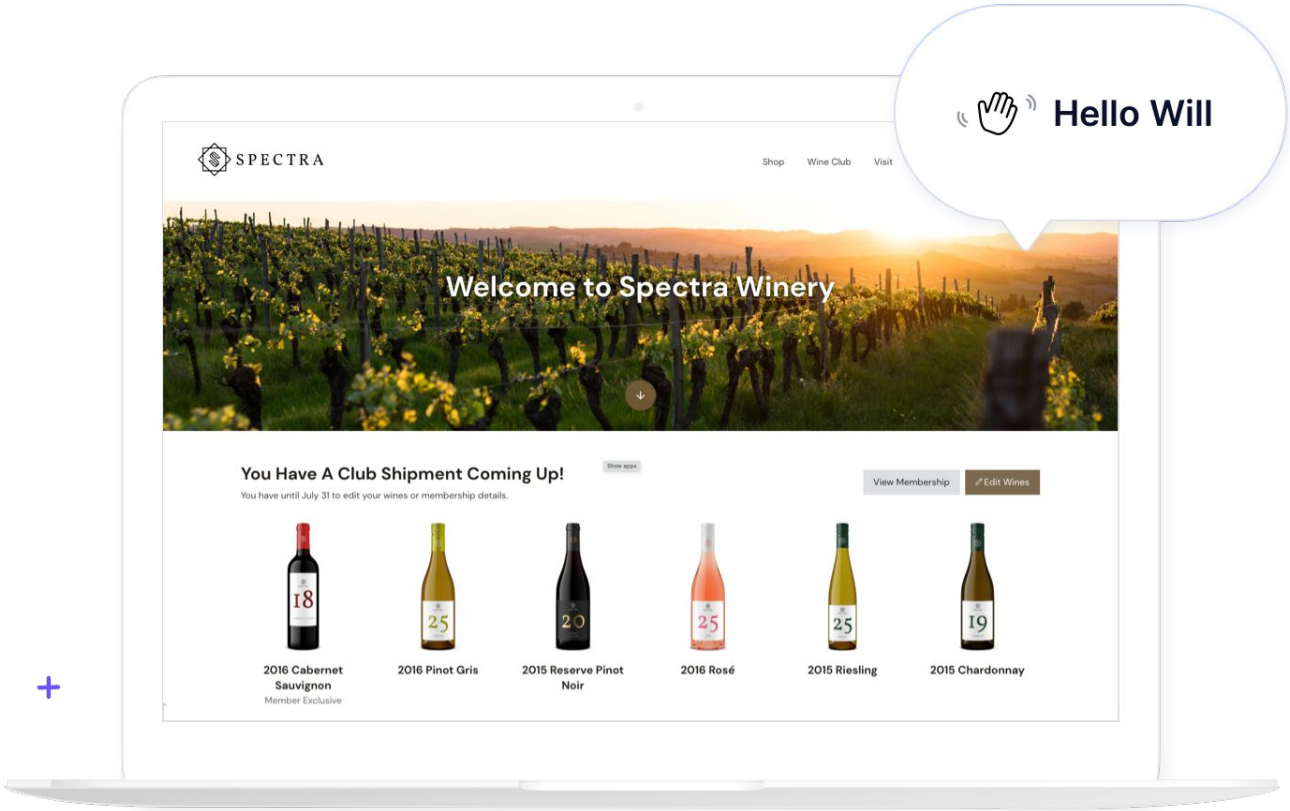
klaviyo
388 wineries

They Nurture Their Customer Base

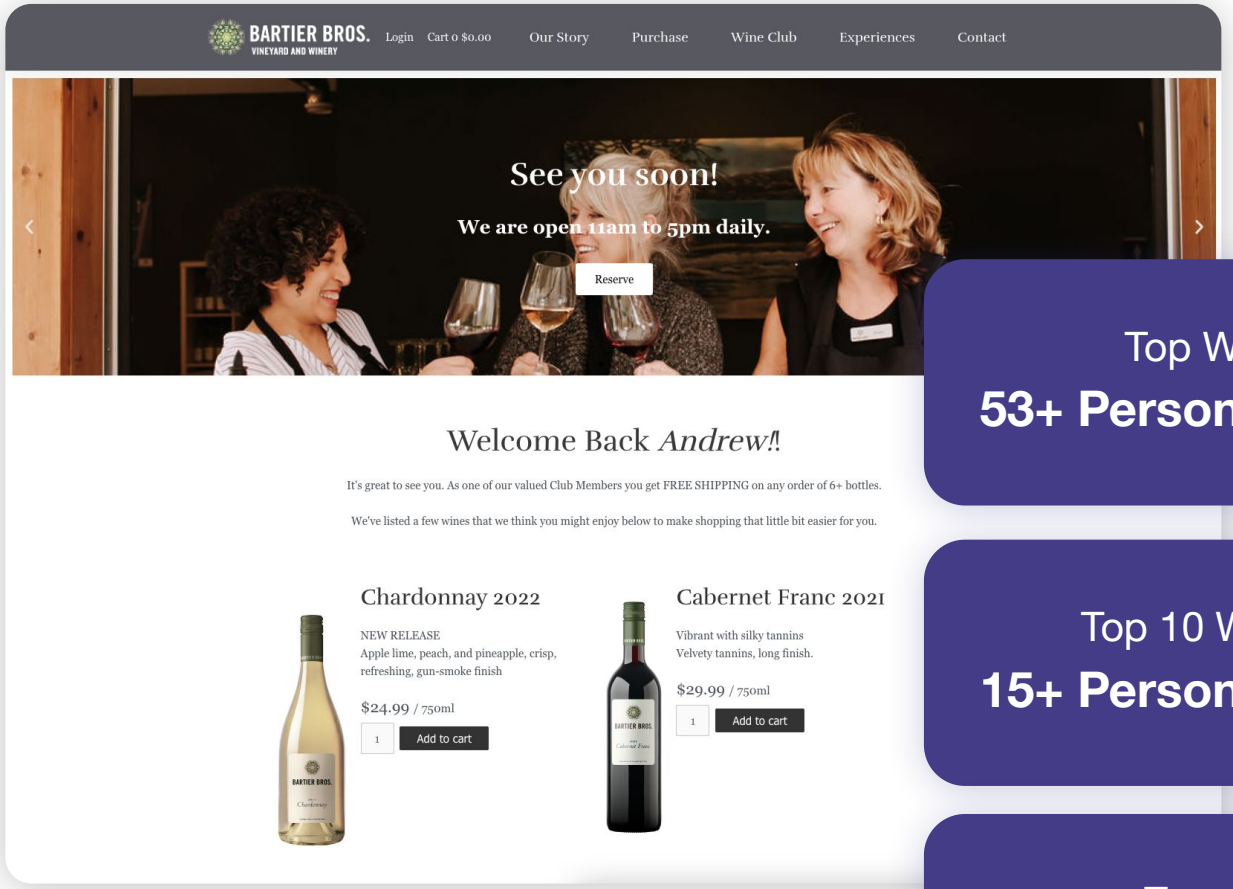


Where orders come from

They Focus on the Customer Experience



They Use Personalizations



Top Winery
53+ Personalizations

Top 10 Wineries
15+ Personalizations

Top 10%
2 Personalizations

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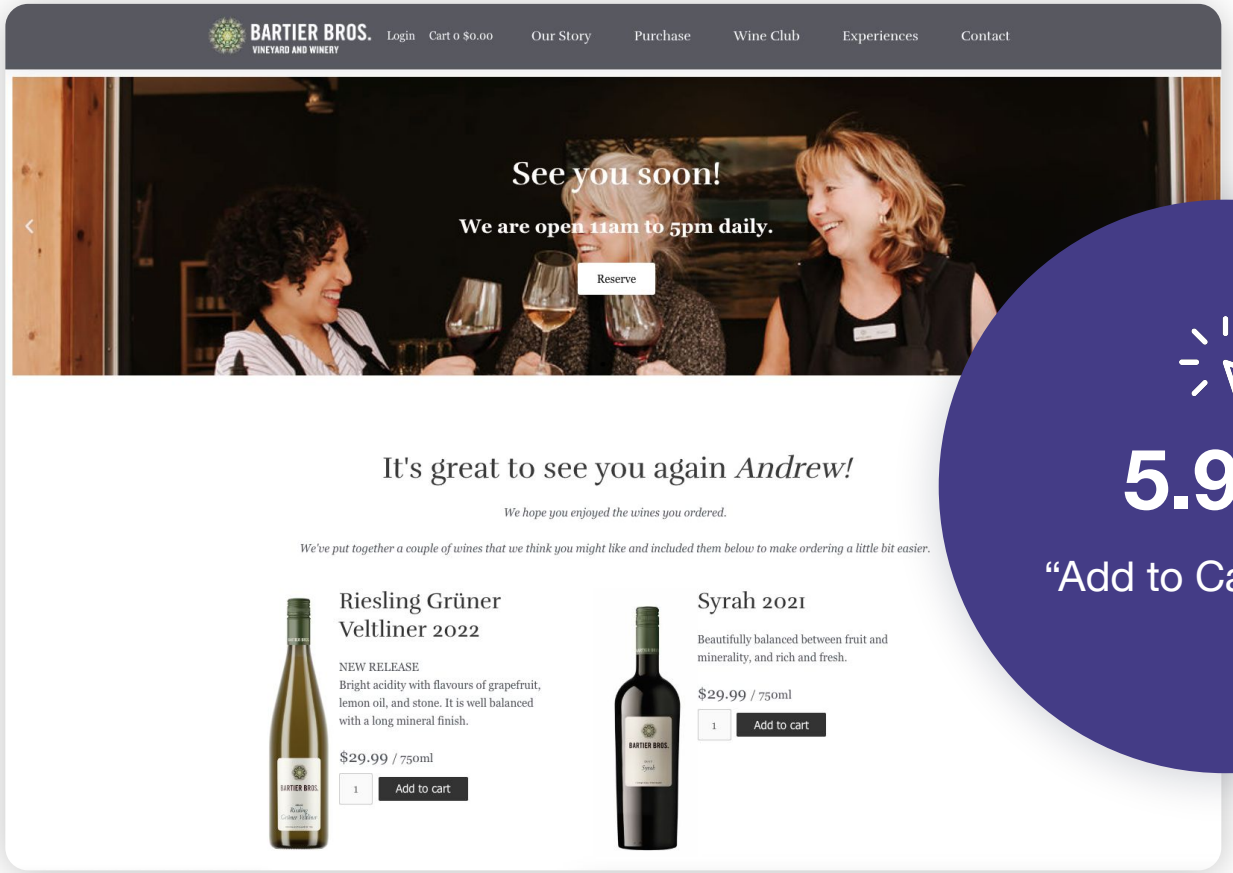
They Use Personalizations



5.94x

"Add to Cart" clicks

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They Use Personalizations

Chosen for you

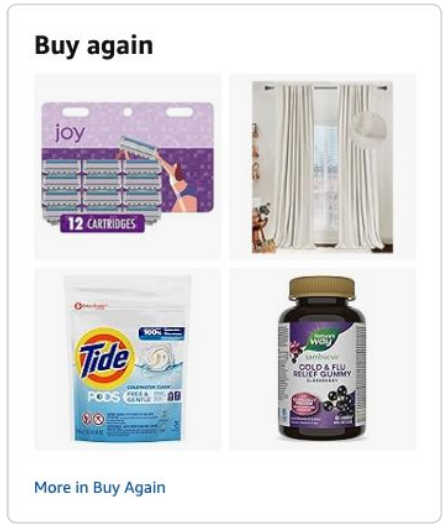
4.5x

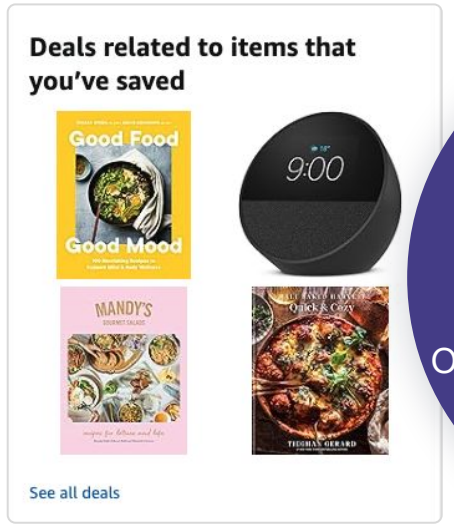
More likely to add to their cart

Source: salesforce.com/form/commerce/power-of-personalized-shopping/

They Use Personalizations

Amazon





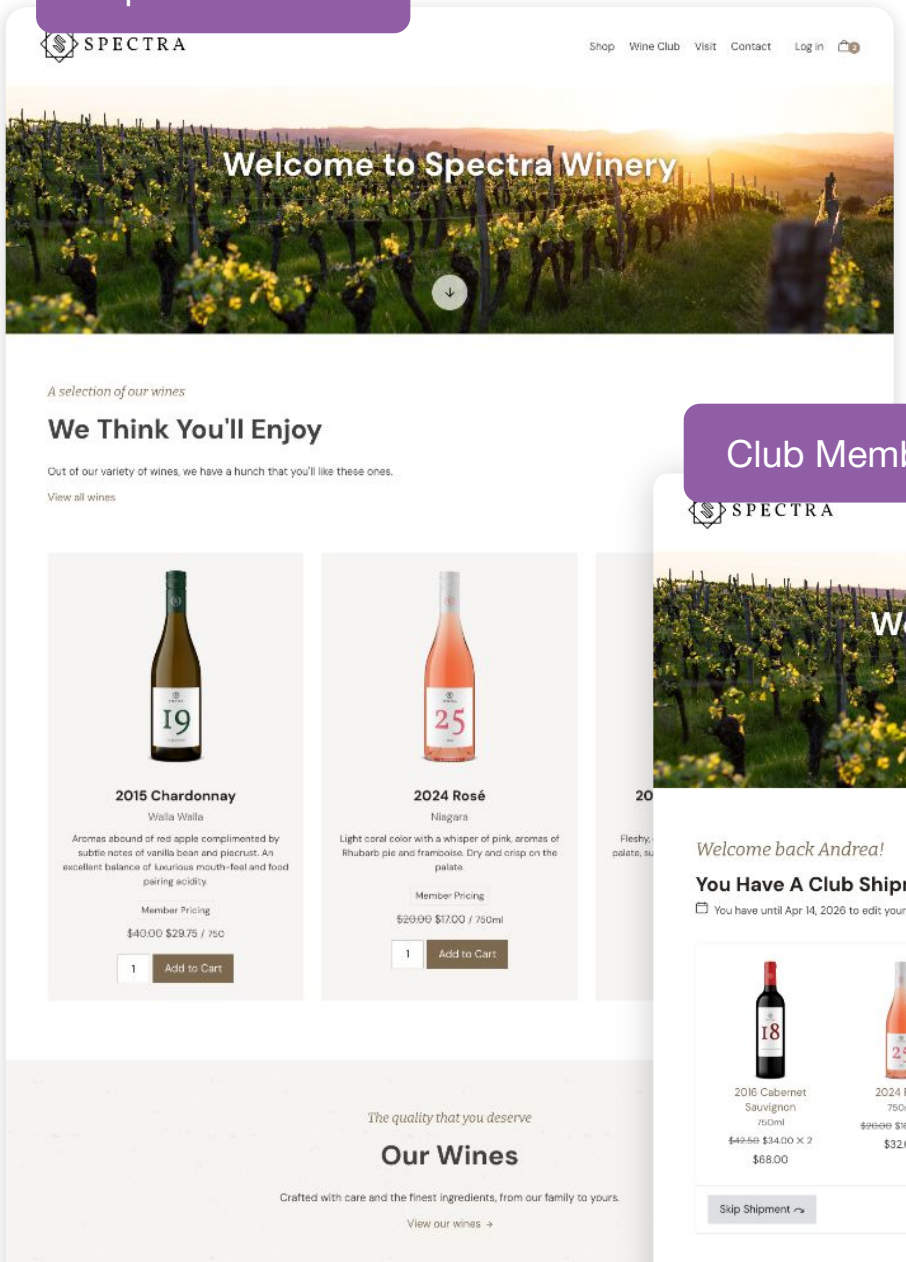
35%

Of revenue generated through product recommendations

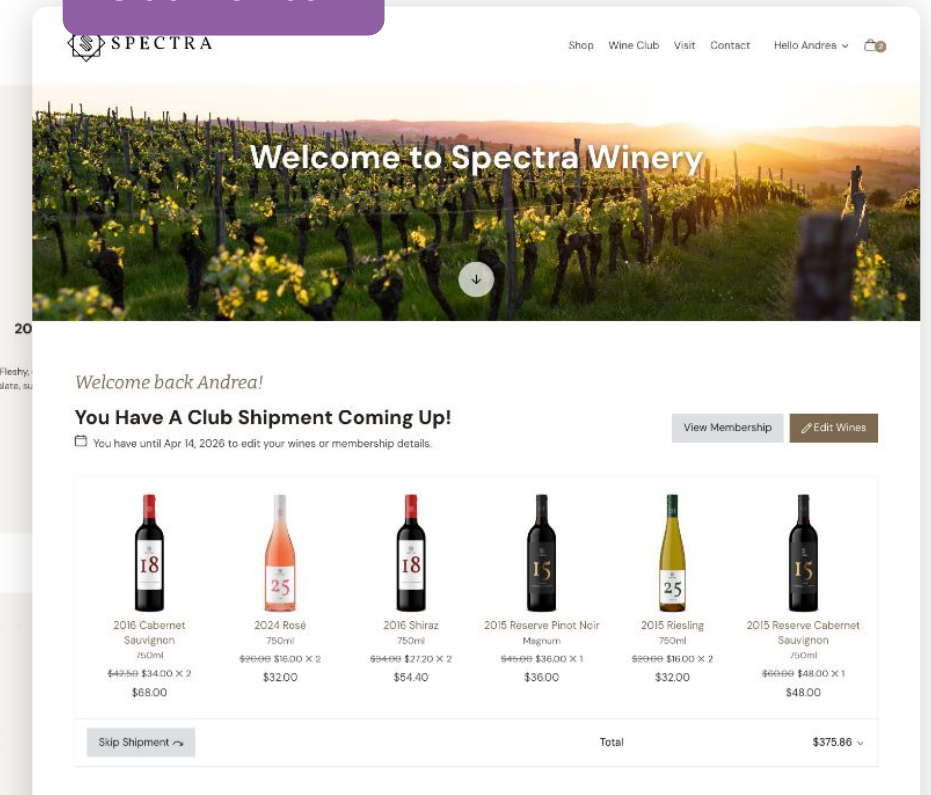
They Use Personalizations

Focus On Customer Experience

Repeat Customer



Club Member



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They Use Carrots

Focus On Customer Experience

Top 1%
36 Carrots

Top 10%
20 Carrots

Top 25%
4 Carrots

Median
1 Carrot

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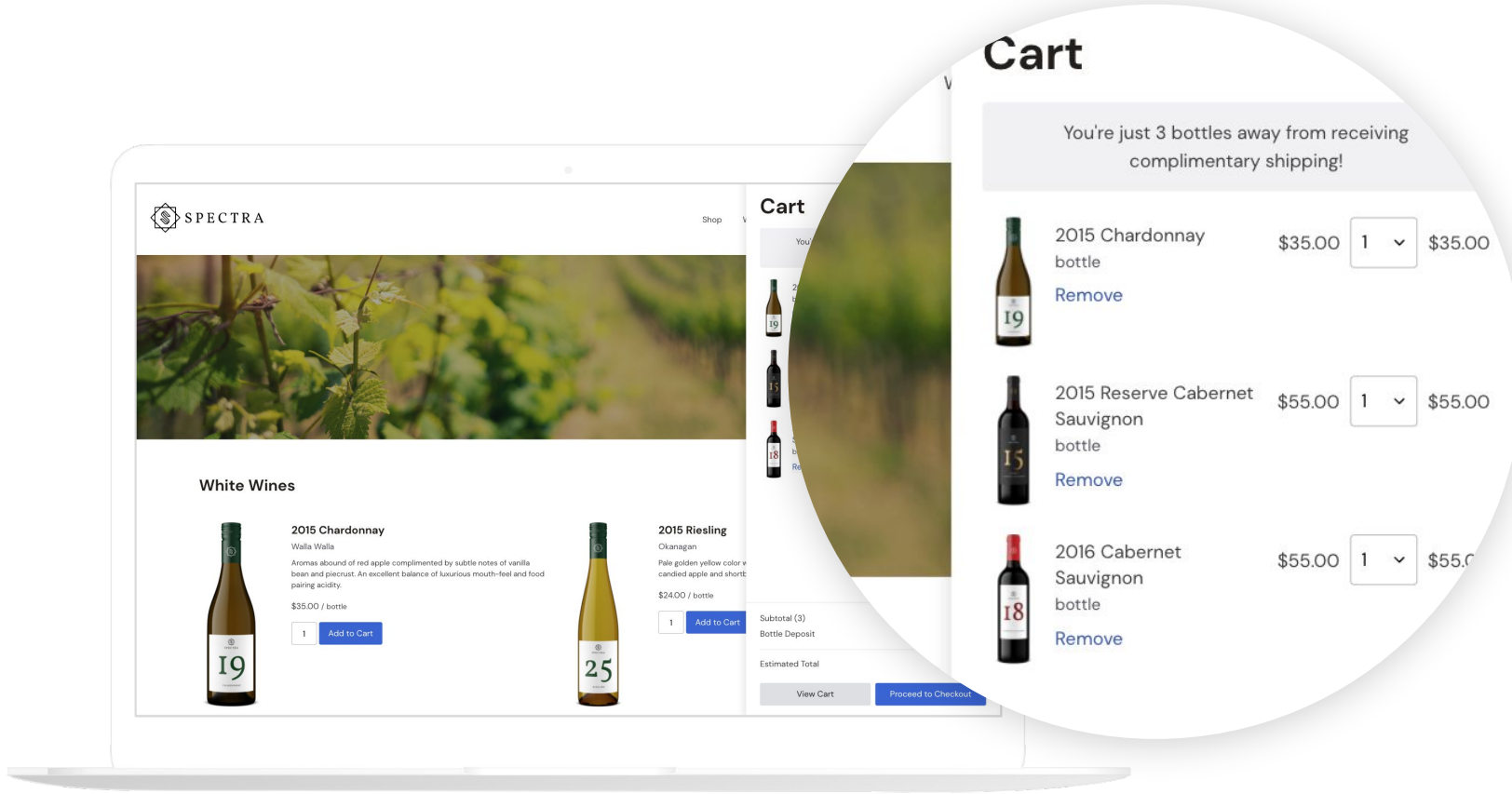
Focus On Customer Experience

They Use Carrots



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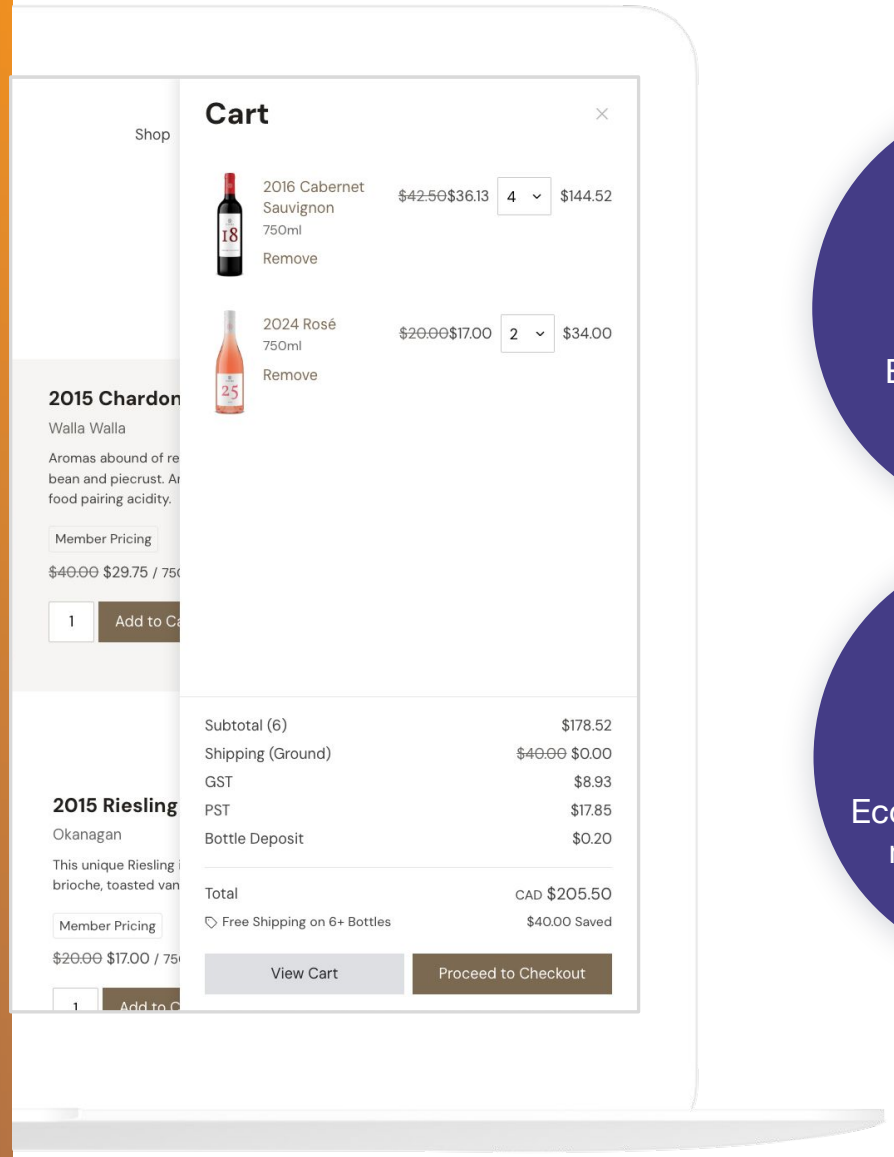
They Use Promotions to Drive Ecommerce Sales



22.5%

Ecommerce orders with free shipping

14.5%

Ecommerce orders with more than 50% off shipping

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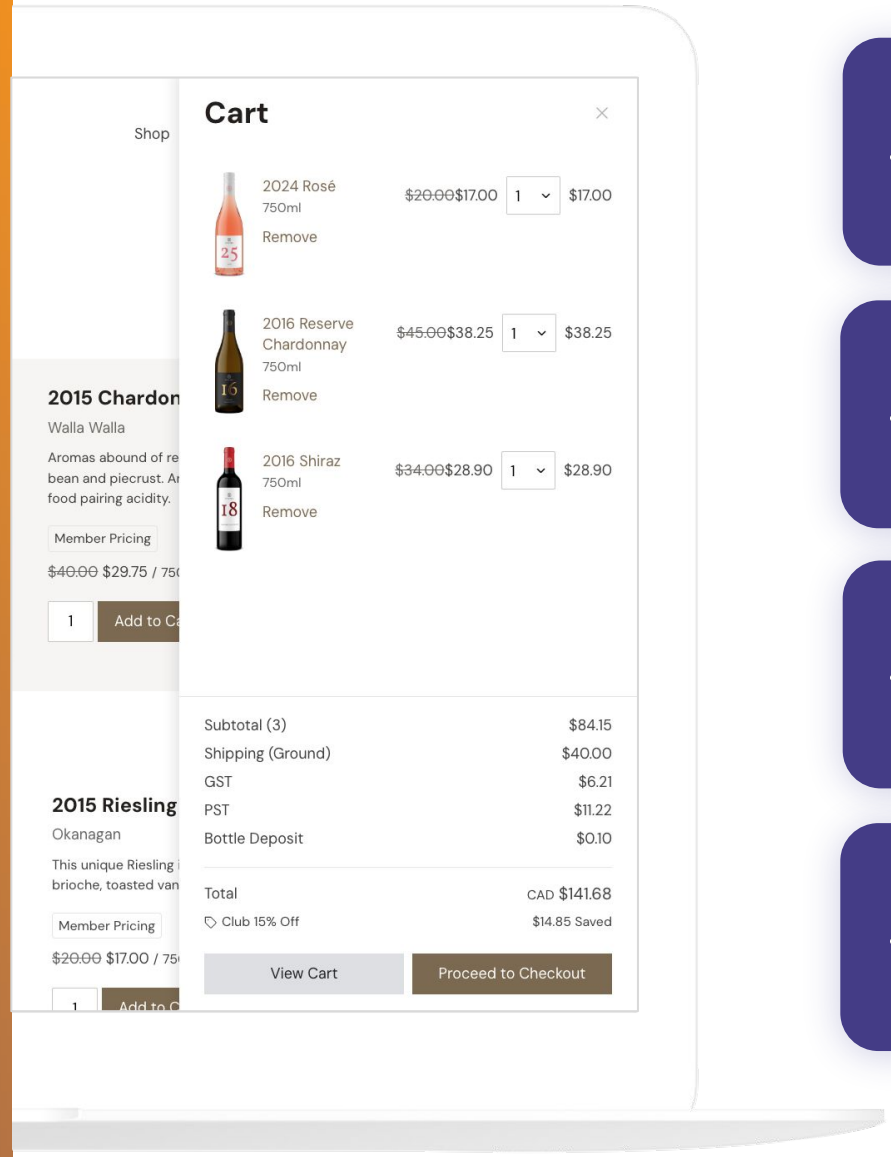
They Use Promotions to Drive Ecommerce Sales



17.2%
Orders with 10%+ Off

8.5%
Orders with 20%+ Off

4.6%
Orders with 30%+ Off

2.3%
Orders with 50%+ Off

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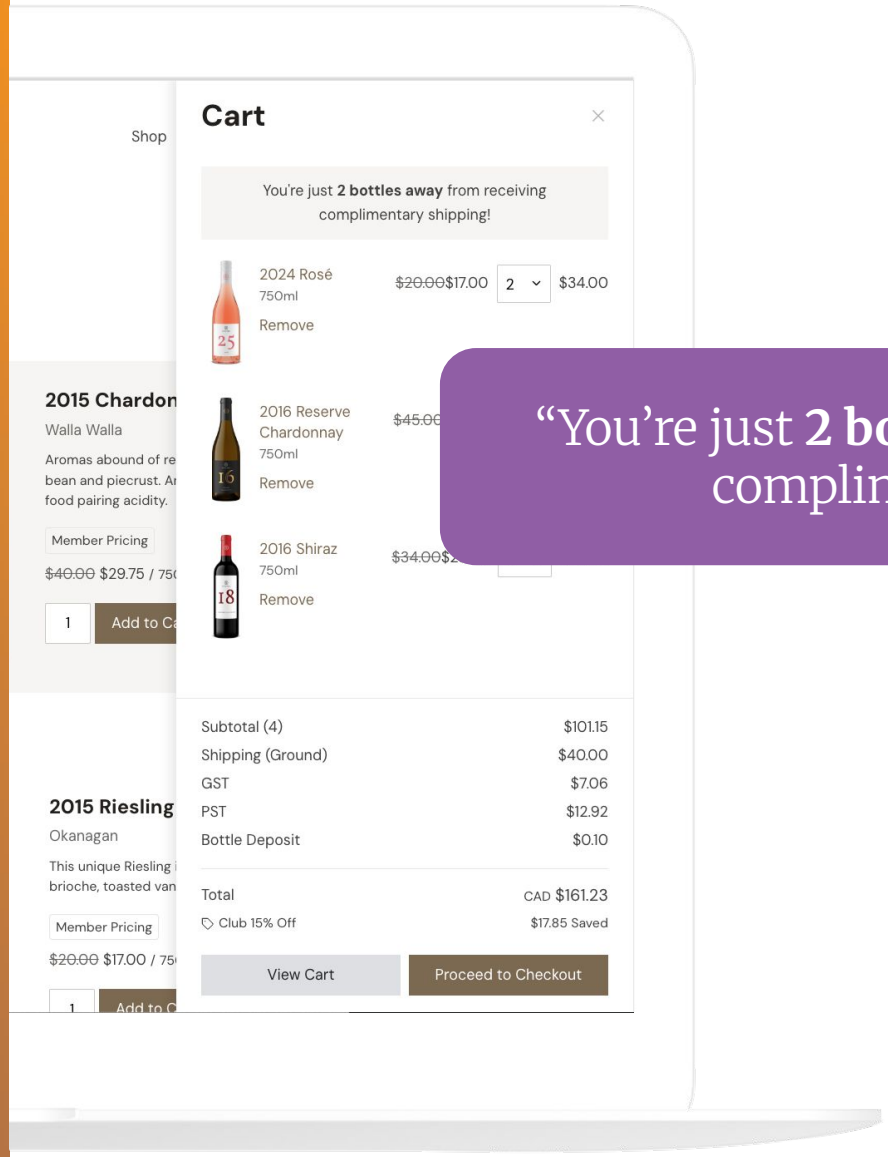
They Use Promotions to Drive Ecommerce Sales



"You're just **2 bottles away** from receiving complimentary shipping!"

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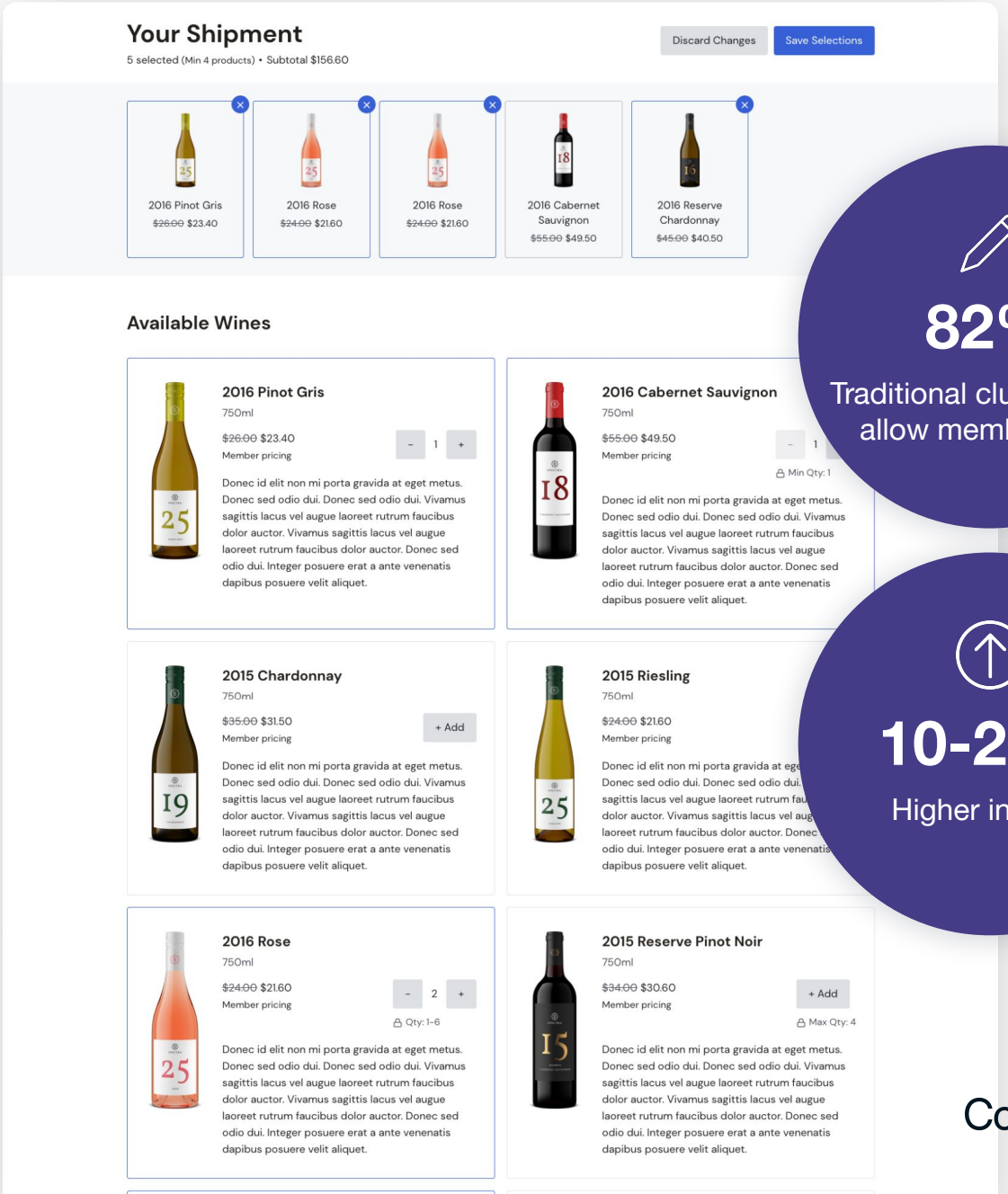
They Allow Club Members to Edit Club Shipments



82%

Traditional club releases allow member edits

10-20%

Higher in value

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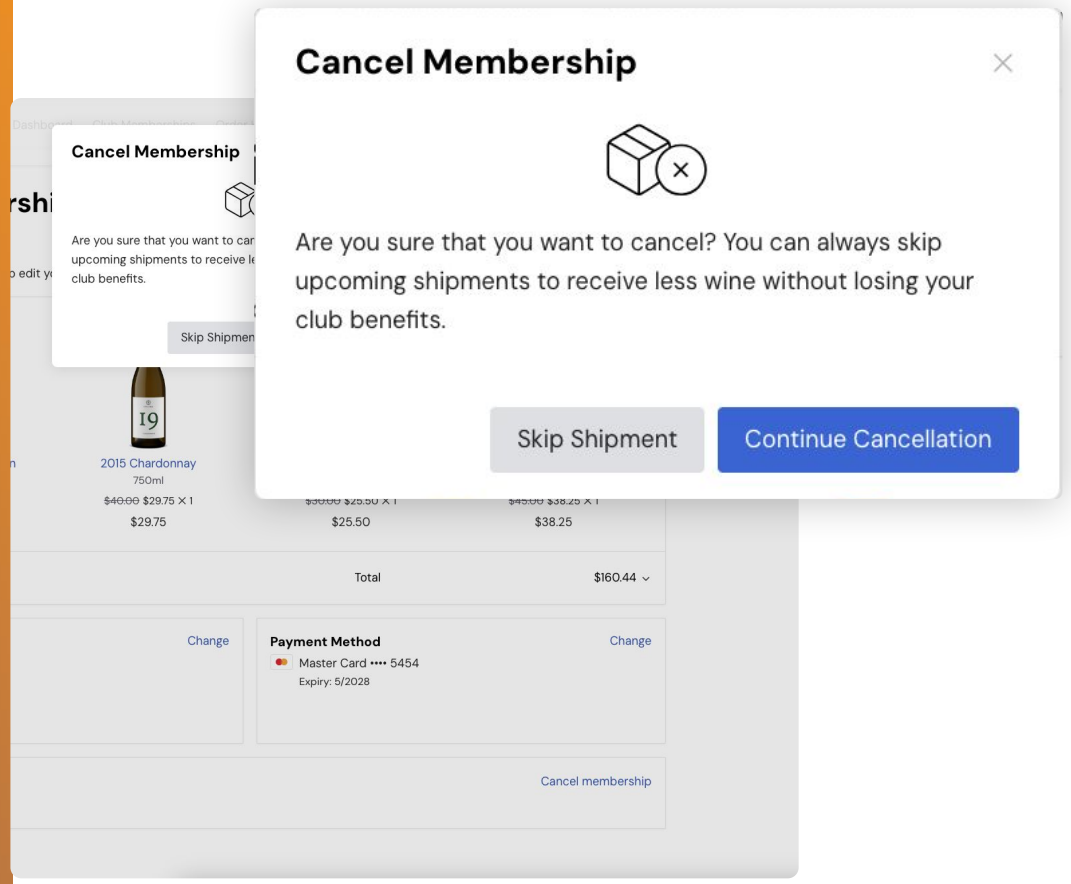
They Allow Club Members to Cancel Online



76%

Sometimes allow members to cancel online

62%

Always allow members to cancel online

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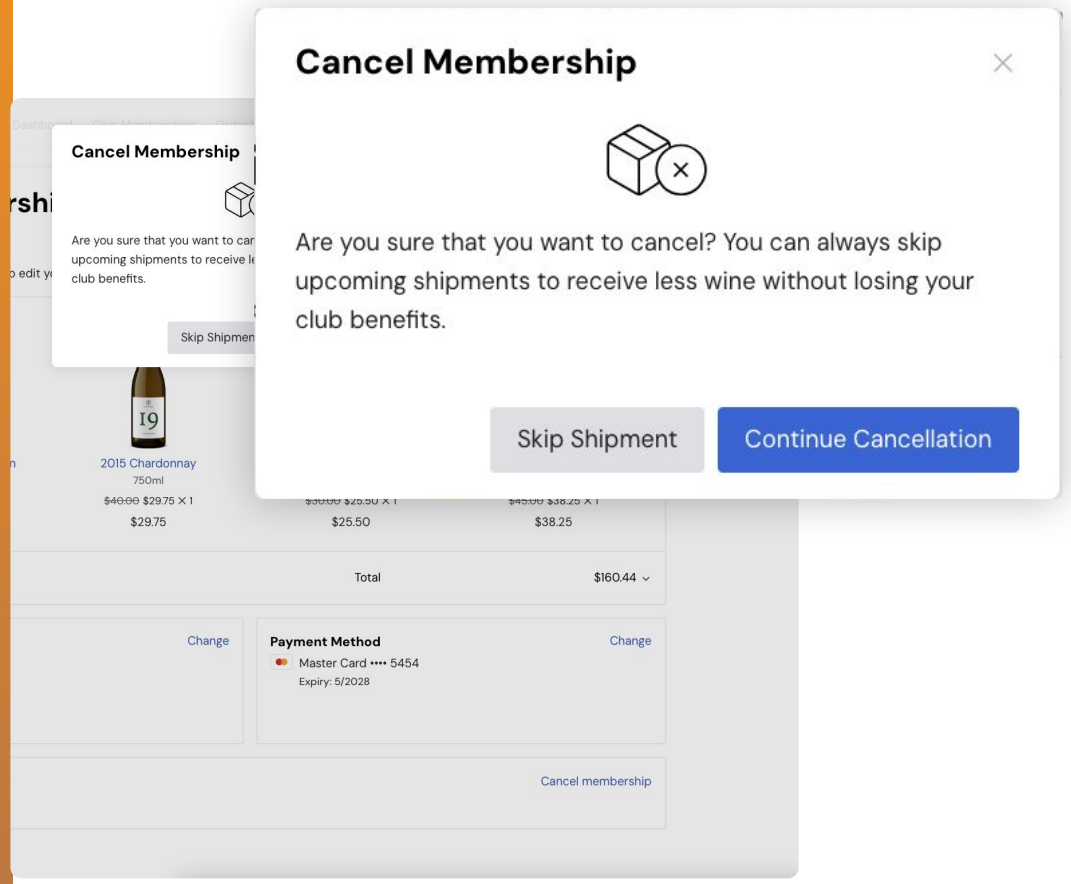
They Allow Club Members to Cancel Online



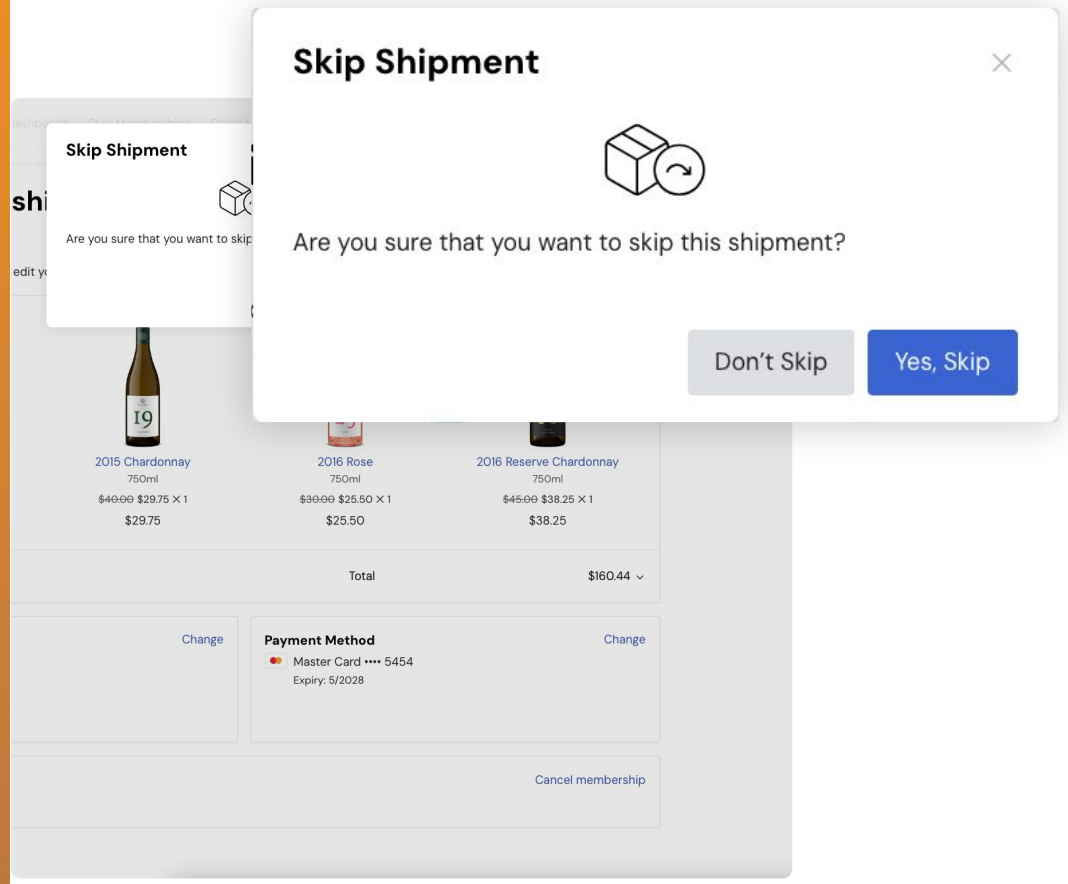
25.1%

Cancel rate when online cancellation is allowed

26.3%

Cancel rate when you don't allow online cancellation

They Allow Club Members To Skip Club Shipments



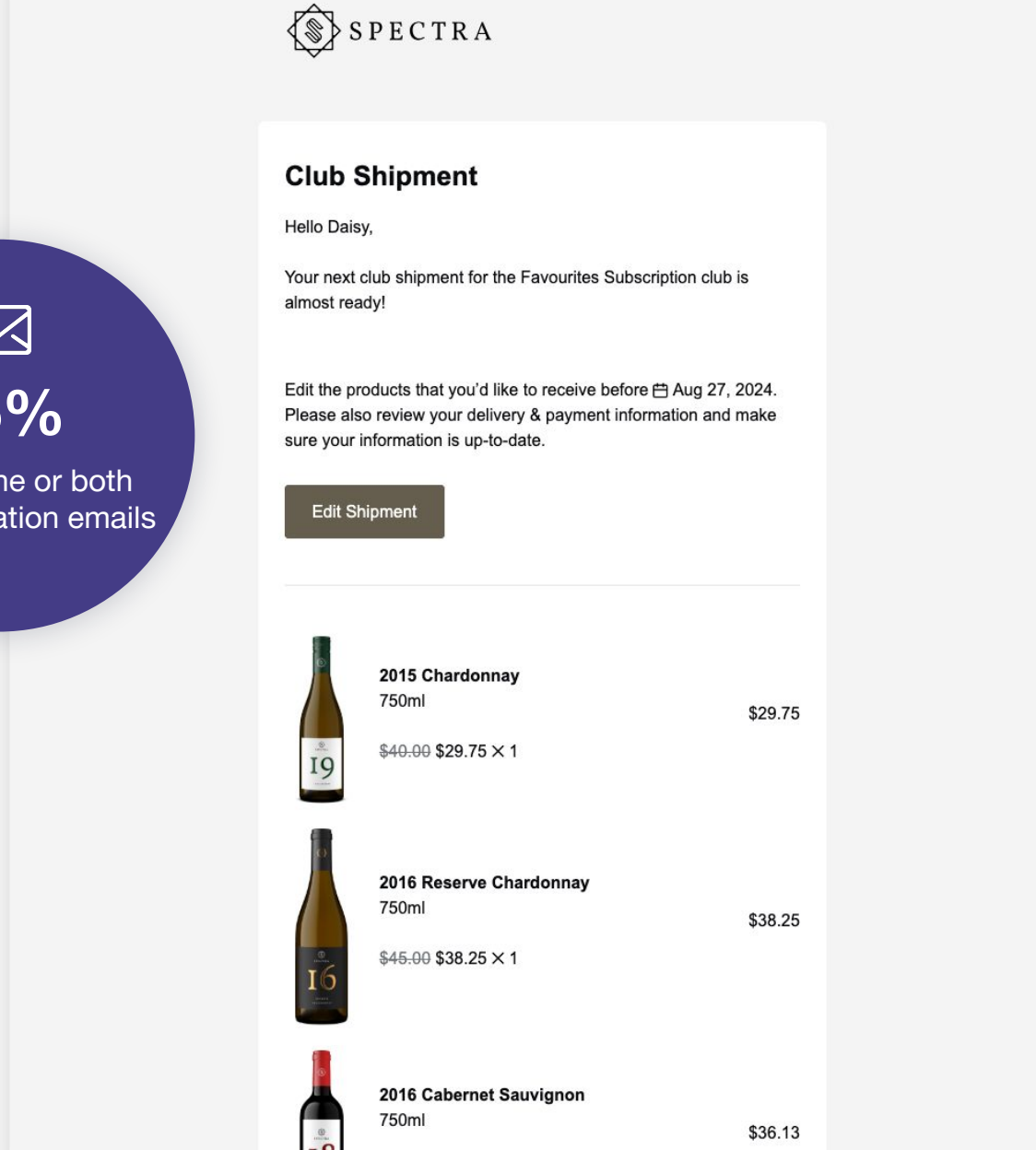
45.4%

Allow members to skip online

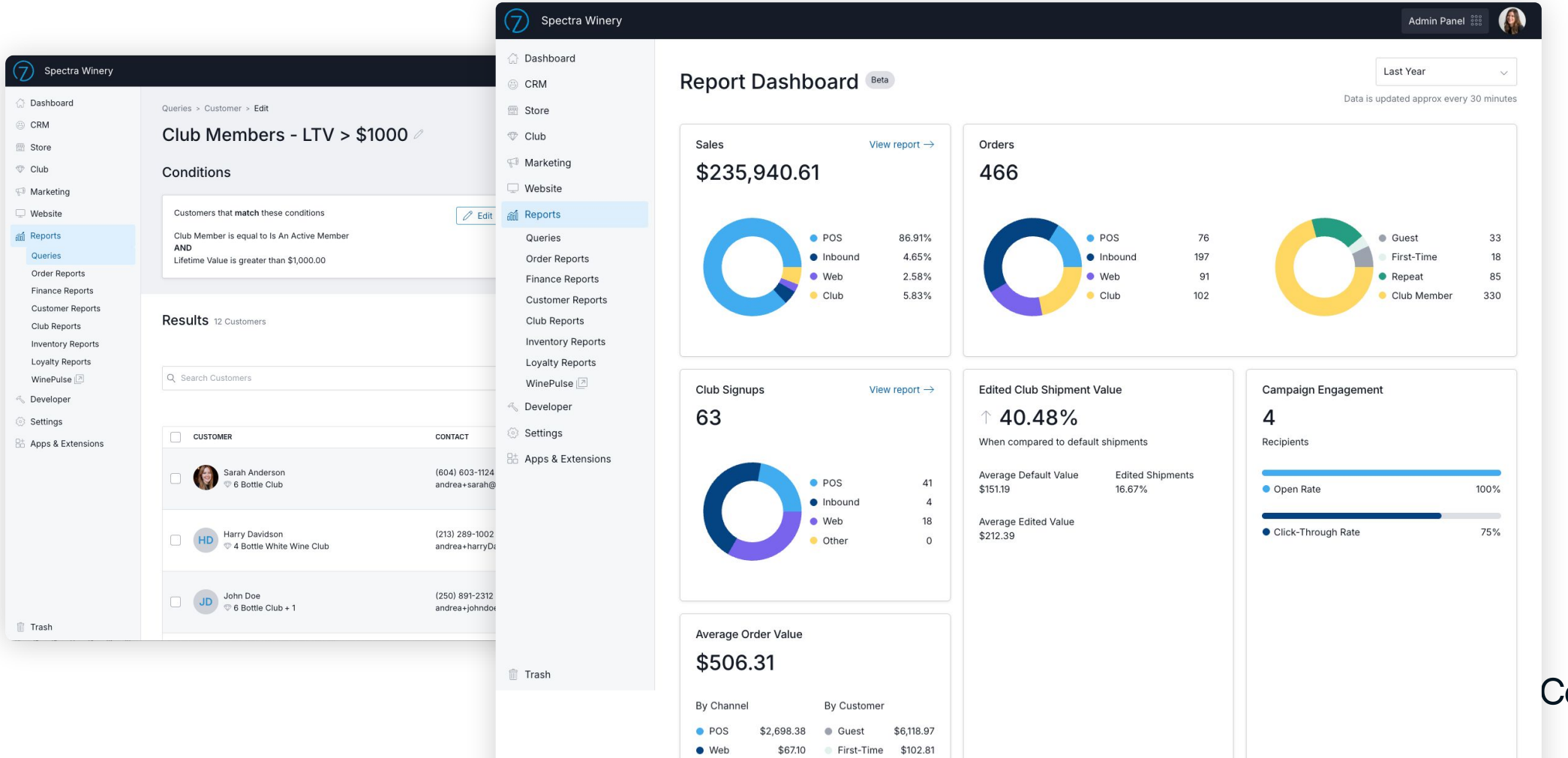
They Send Club Shipment Emails

45%

Disable one or both club notification emails



They Believe in Data



Commerce7

They Build Queries

Top 10%
68 Queries

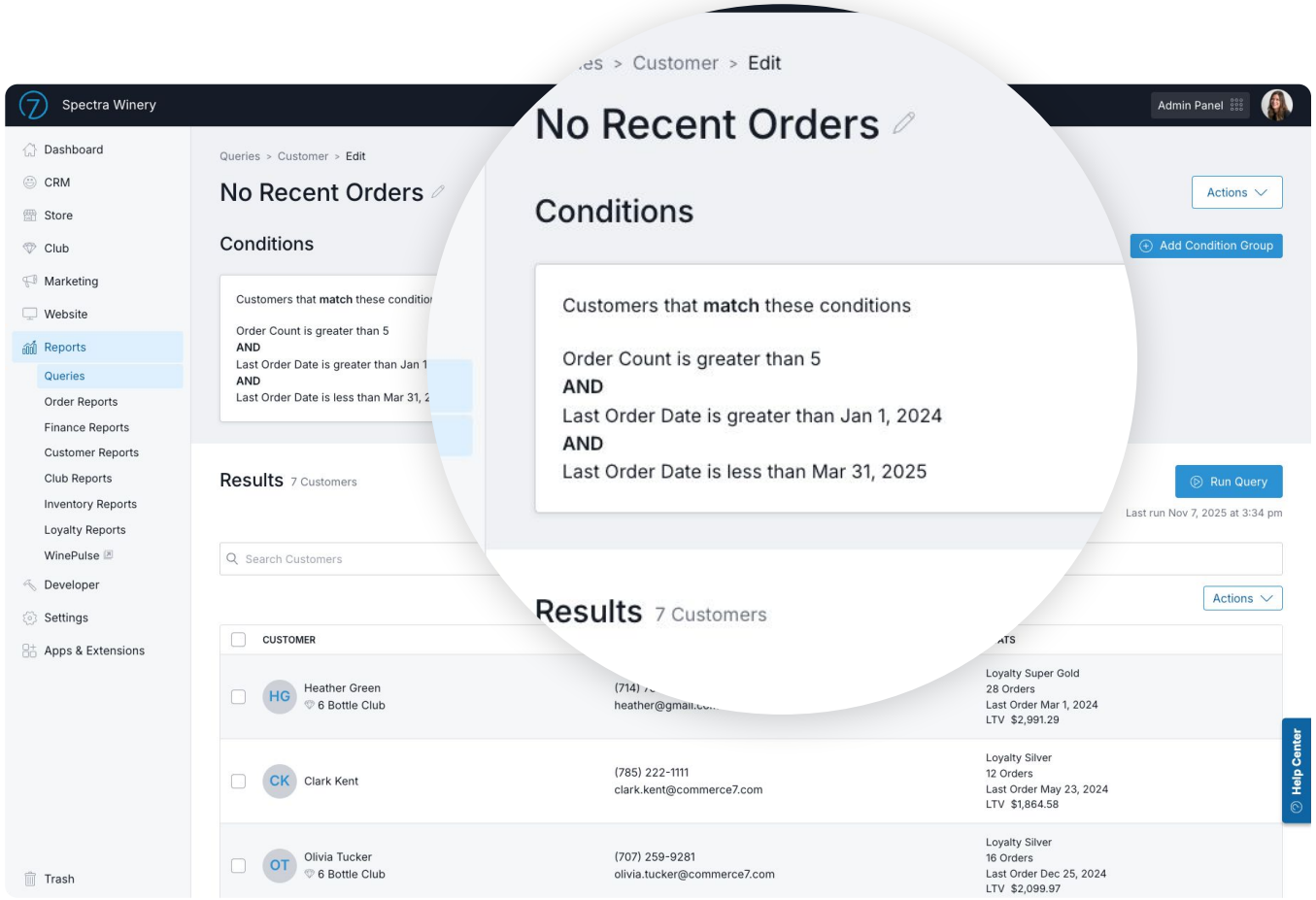
Top 25%
26 Queries

Median
6 Queries

Average
25 Queries

They Build Queries

They Believe In Data



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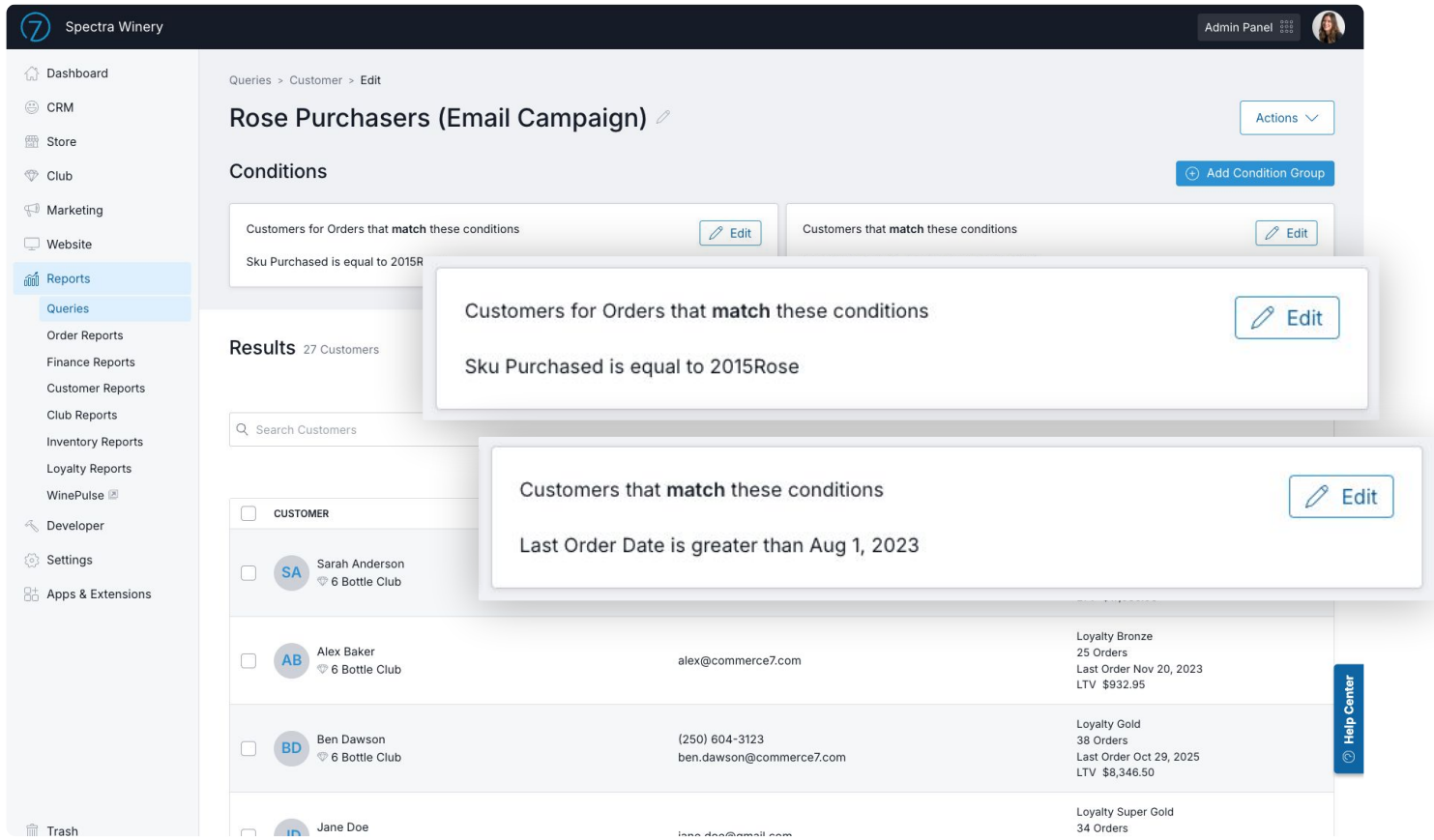
They Build Complex Queries

Top 10%
6 Complex Queries

Top 25%
1 Complex Query

Median
0 Complex Queries

They Build Queries



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They Segment Customers

They Believe In Data

Top 10%
88 Tags

Top 25%
44 Tags

Median
20 Tags

Average
38 Tags

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WINE SYMPOSIUM
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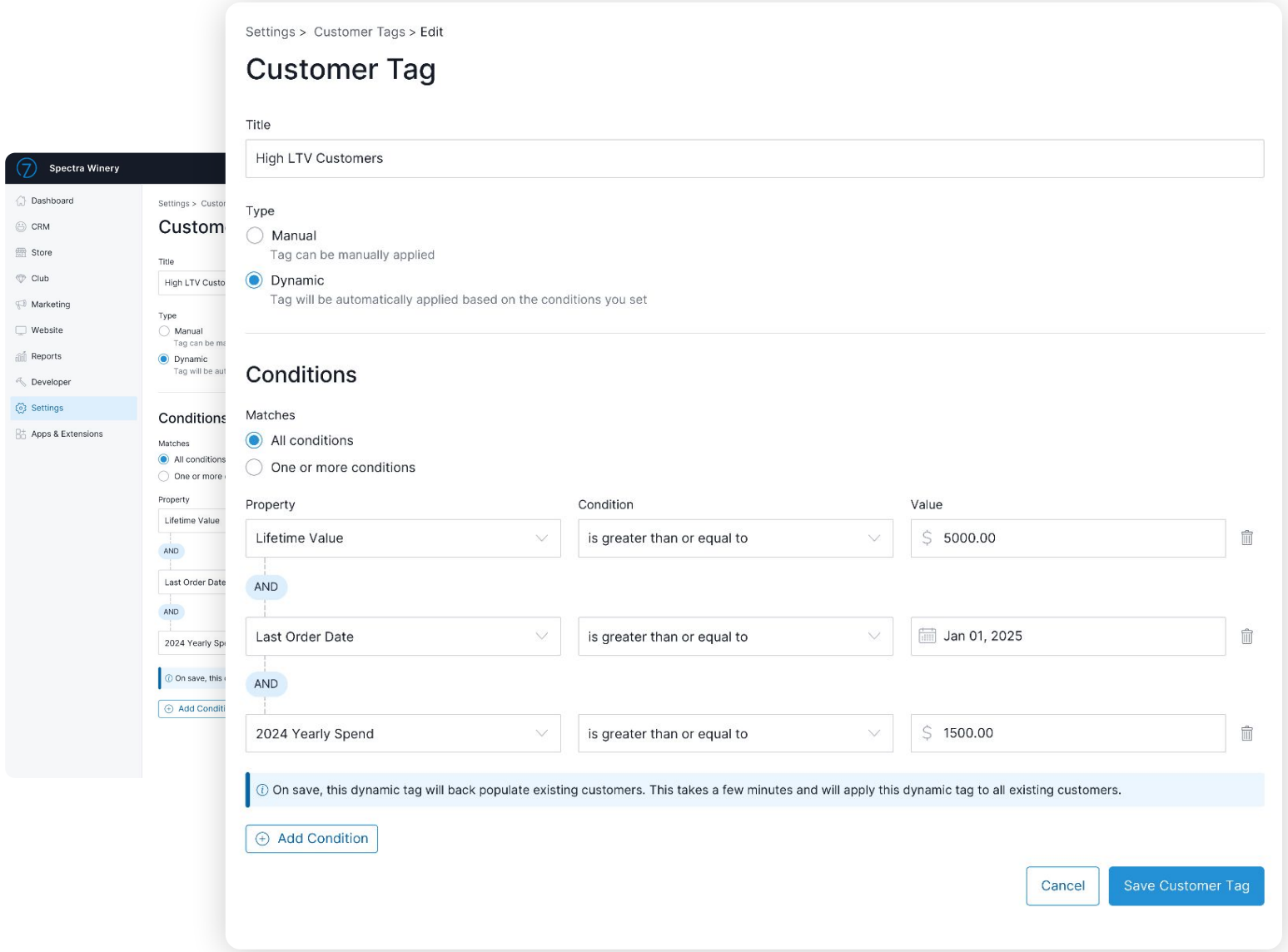
They Segment Customers



Direct to Consumer
WINE SYMPOSIUM
FREE THE GRAPES

Commerce7

They Use WinePulse or Enolytics

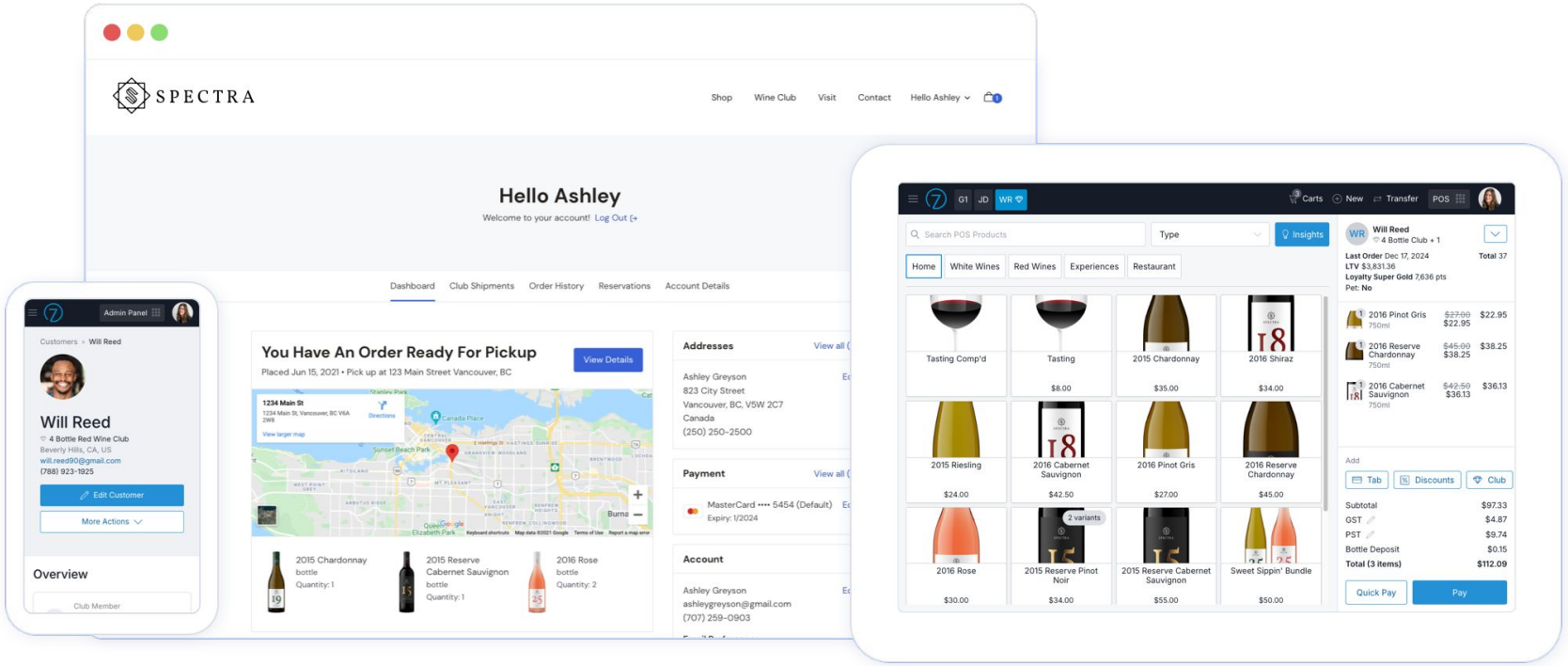
ENOLYTICS

110 wineries

WinePulse

246 wineries

They Embrace their DTC Platform



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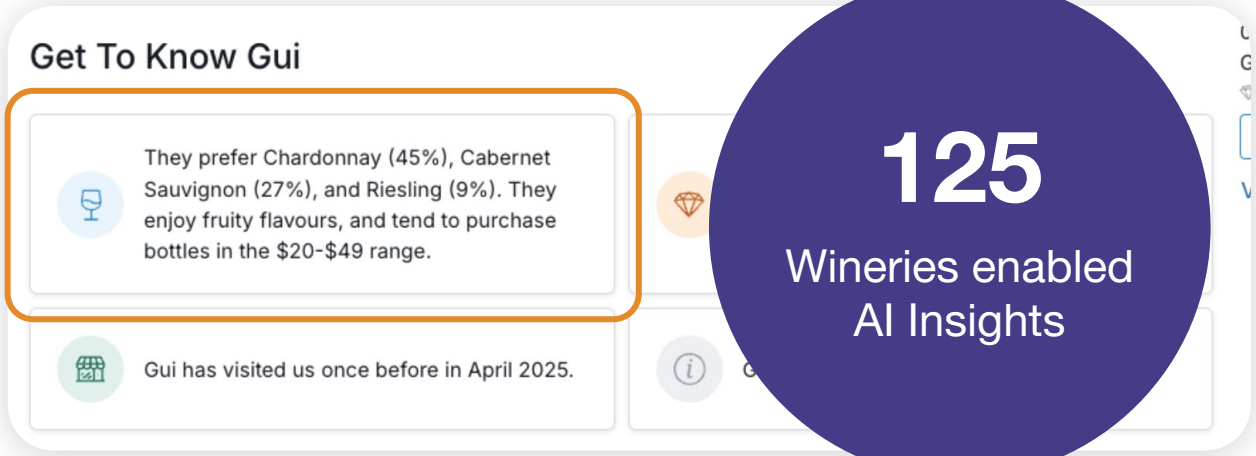
They Try New Things

They Believe In Data

157
Wineries enabled
Churn Prediction



125
Wineries enabled
AI Insights

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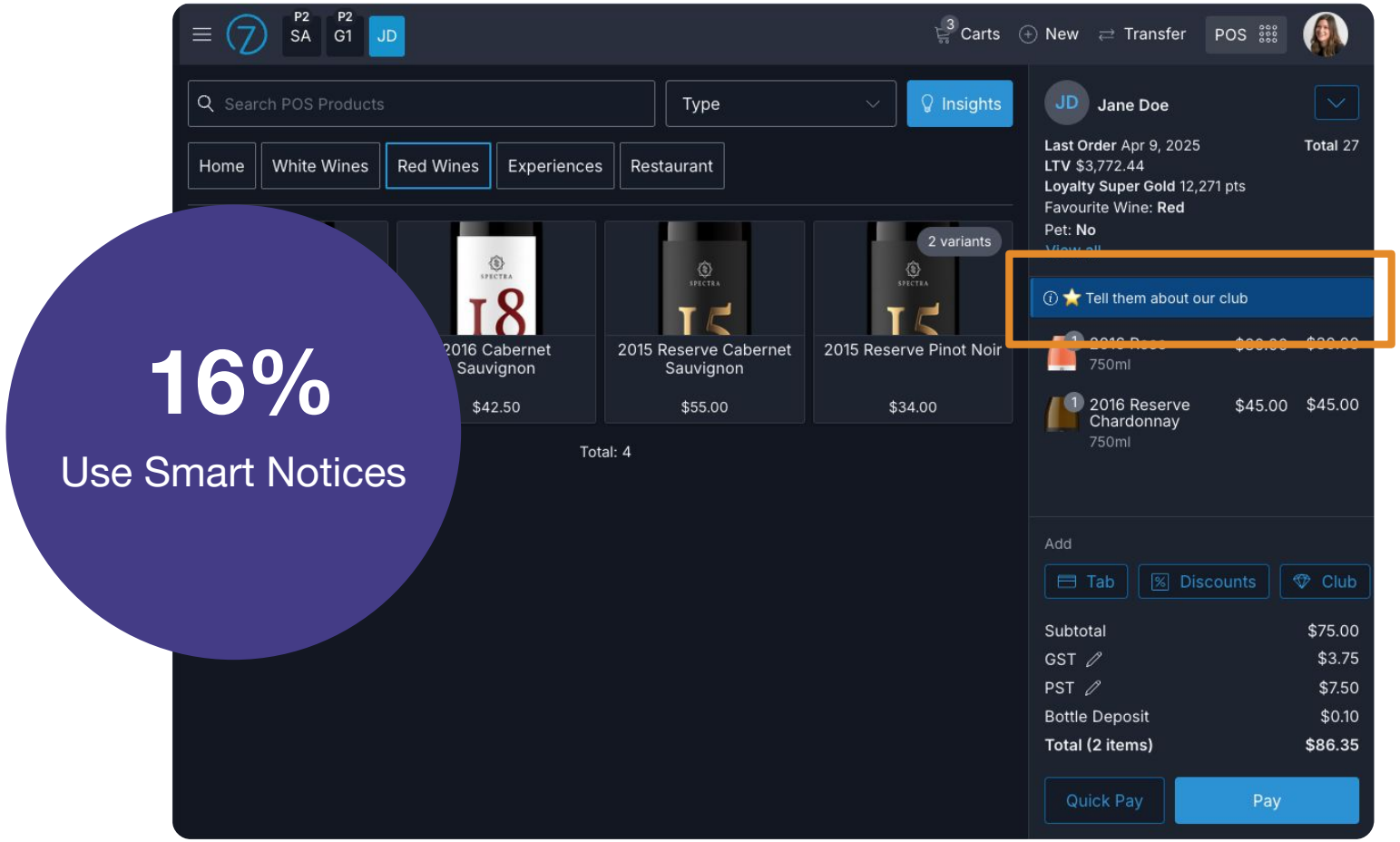
Commerce7

They Prompt Their Staff



16%

Use Smart Notices

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They Prompt Their Staff

Top 10%
2 Notices

Median
0 Notices

Direct to Consumer
WINE SYMPOSIUM
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Closing