

**WIV 20  
23**



## Dave Eriksen

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## Company Overview

- Family-owned with an entrepreneurial spirit
- 3 Brands – HALL | WALT | BACA
- 100,000 Cases Annually
  - 80% DTC – 20% Wholesale
- 50+ Small-lot Wines
- 25+ Vineyard Sources (50% owned)

## DTC Mix

- 5 Tasting Rooms in Napa & Sonoma Counties
  - 6<sup>th</sup> coming to Palm Springs October 2023
- Club Shipments 46% *(includes pick-ups)*
- Tasting Room Sales 28%
- Club Phone Sales 14%
- Ecommerce 12%

# WHERE WE ARE NOW:

- 2020 shift to Ecom & Phone sales – swinging back to visitation
- Not seeing same traffic levels as in 2019
- Virtual tastings - all but dried up (for us)
- 2022 vs. 2021
  - TR Traffic - 3.0%
  - DTC Rev. +7.4%
  - Club Conv. +5.5%
- Raised Tasting Fee prices – No refunds
- Maximizing new reservation system
  - Charging fees 24hrs in advance = +\$300k in revenue
- Personnel shift – Younger and greener sales team
- Walk-ins vs. Reservations Only
- Younger customers looking for “experience” vs. tasting
- SF Chronicle - Napa pricing itself out - losing traffic to other regions?
- SVB Report suggested holding price
- Expenses are going up





## OTHER DATA WE LOOK AT:

- Community Benchmark
  - Keep tabs on our comp set
- No one set of data - New data & old data in new ways
- Every metric with historical, use charts to see trends
  - Individuals' performance
- Member vs. Non-member sales - tasting fees vs. wine sales
- Frequent Flyers
- Forecasting - future bookings at same point in time last year
- Booking window, how far out are people booking
- Where are they booking from?
- Travel site reviews
- Data Capture



# WHAT WE ARE FOCUSING ON:

- Consistency across departments
  - Training program
- Cleaner Data
- Travel Site Reviews
- Optimize UX of making reservations
- Extending service experience and more feedback
  - Pre-visit confirmation / concierge service
  - Post-visit follow up call/email/survey/travel sites
  - WISE mystery shopping & training
- Marketing focuses:
  - Align social and SEO with regional associations
  - Conquesting
  - Relationship Marketing
  - Data Capture
- Dynamic pricing?

**BA  
CA**

