

# DtC Matters

## What the Experts Will Be Looking at this Year

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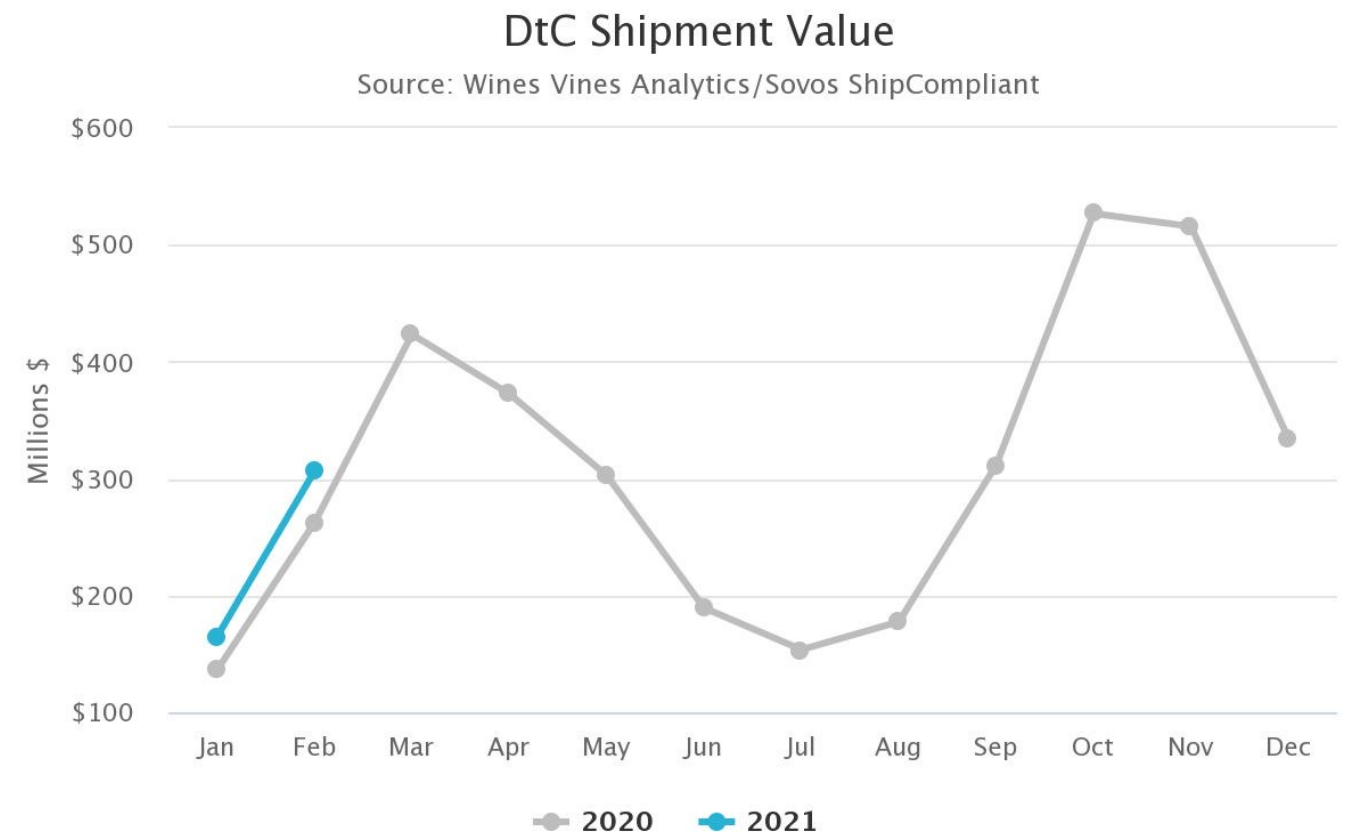
WISE Academy

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# DtC Shipment Value up 17%

- Total shipment value in Feb surpasses \$306 million, 17% more than in Feb 2020.
- In 2020, February shipments totaled \$262 million representing zero growth over previous year.
- Pandemic impacts started last week of March big increase came in April.

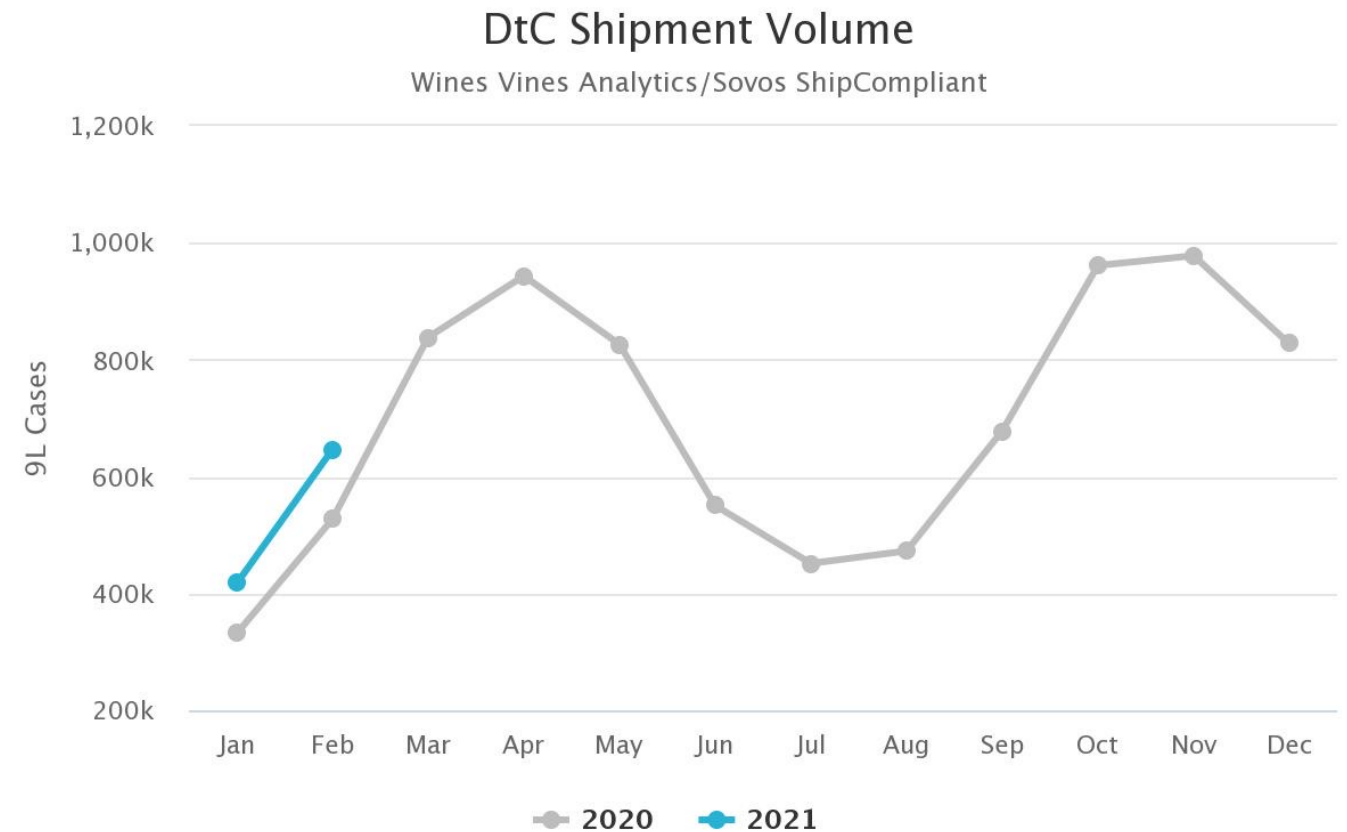


Wines Vines Analytics

CENTRAL COAST  
*Insights*

# Volume up 23%

- Wineries shipped 646,466 cases in February, 23% more than last year.
- April 2020 volume was 943K cases, third-highest total after Oct/Nov.
- April typically a high point for total volume from club shipments. In abnormal year, DtC still followed same curve.



Wines Vines Analytics

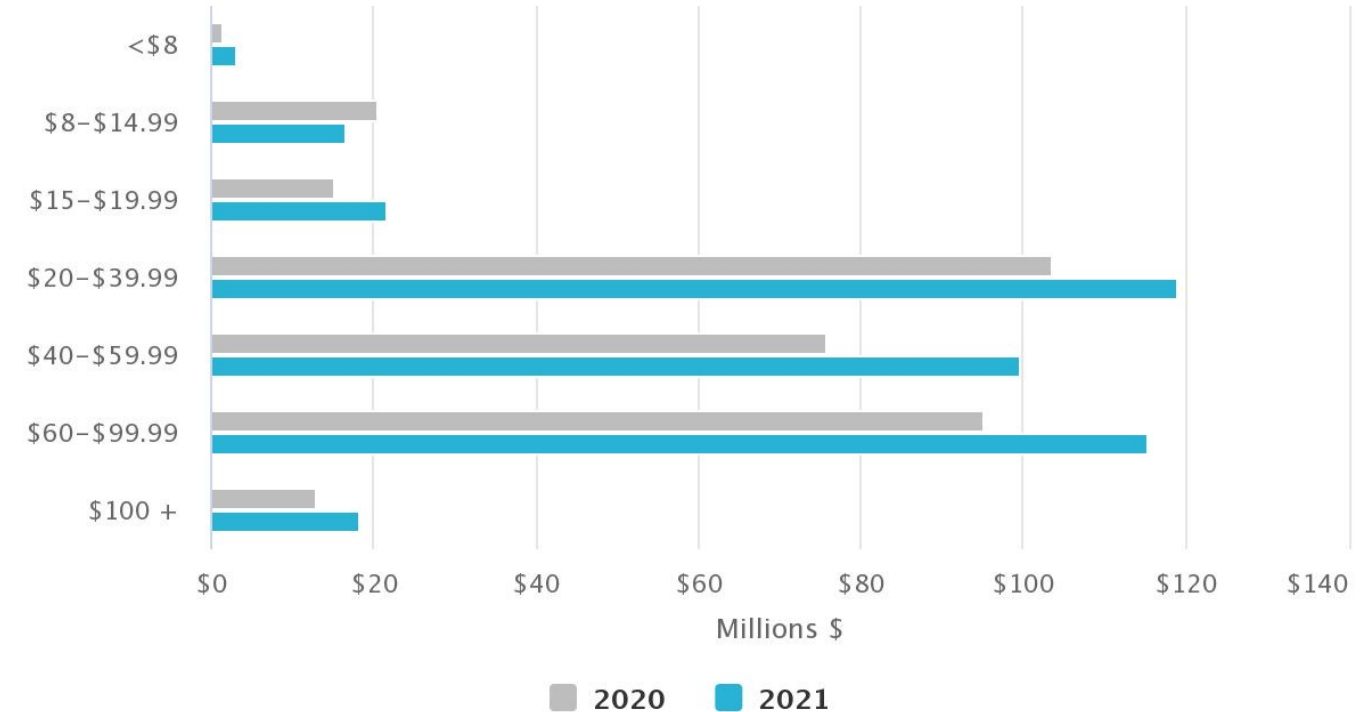


CENTRAL COAST  
*Insights*

# Central Coast Shipments

- 12-months ended Feb. 2021, total \$393M (21% YA) in value and 940K (18%YA) in volume.
- Third in total \$ value (after Napa, Sonoma).
- Average bottle price holding up, in past 12 months up 3% to \$34.87.
- Growth at both ends of market (<\$8 up 111% and \$200+ up 3X!) but most value gain at \$40-\$59 grew 31% = \$24M+ sales.

Central Coast Shipments by Price  
Source Wines Vines Analytics/Sovos ShipCompliant, 12 months ended February

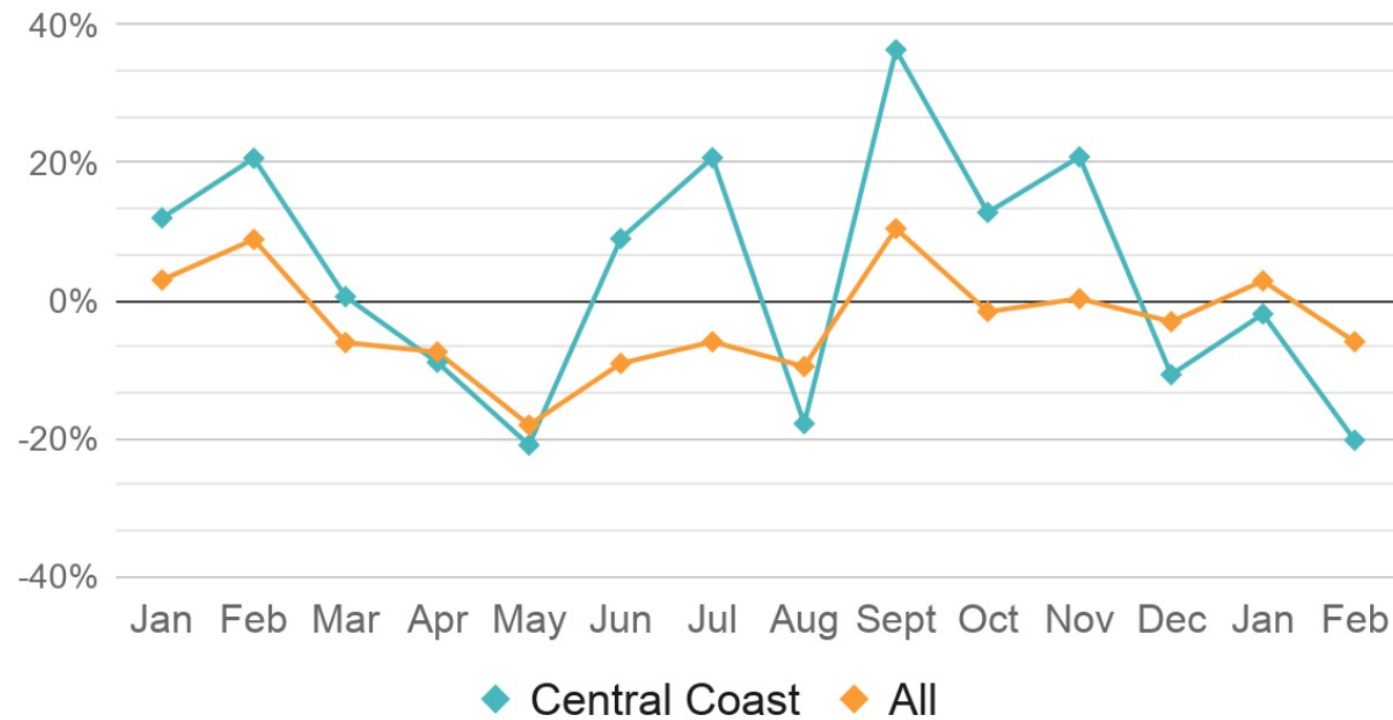


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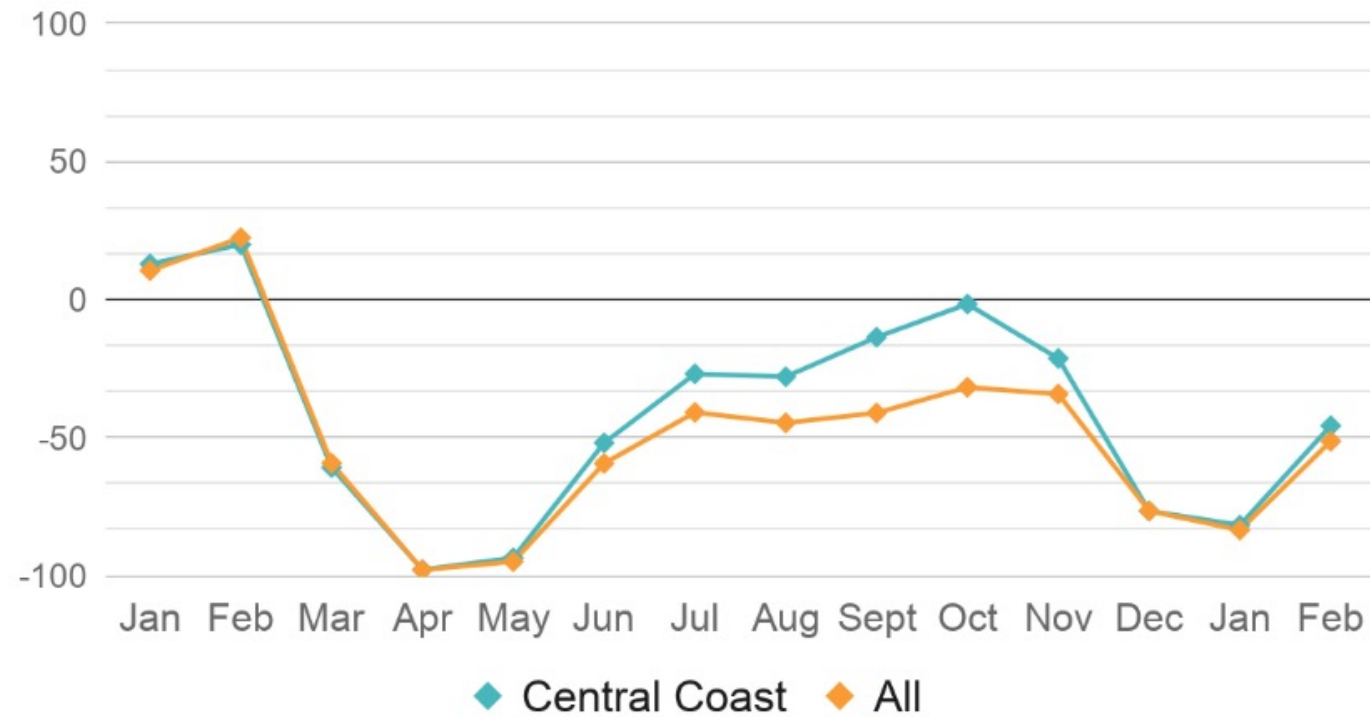
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### Monthly Total DTC Revenue % Change



Total DTC % Change		
	CC	All
2020 Tot	<b>+6.3%</b>	<b>-1.7%</b>
February	<b>-21%</b>	<b>-4.9%</b>
2021 YTD	<b>-16%</b>	<b>-2.5%</b>

### Monthly Average YOY Visitation

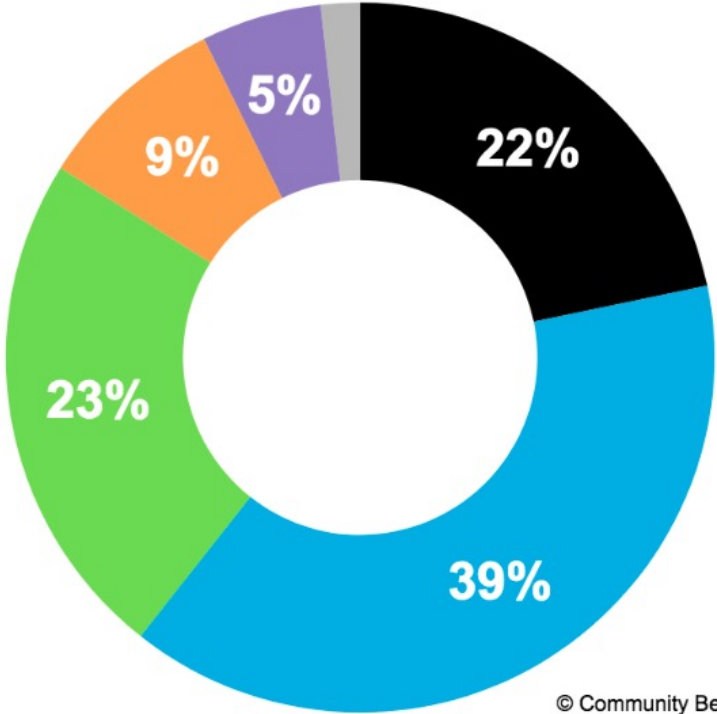


Visitation YOY Change		
	CC	All
2020 Total	<b>-40%</b>	<b>-49%</b>
February	<b>-46%</b>	<b>-51%</b>
2021 YTD	<b>-62%</b>	<b>-65%</b>

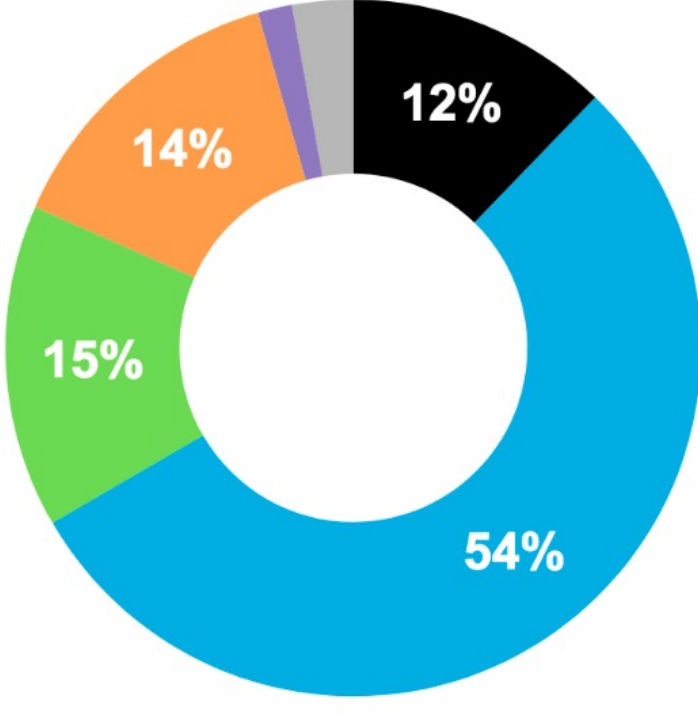
2021 Year-to-Date Total DTC Revenue Channel Split

- Tasting Room
- Club Shipments
- Online
- Phone
- Events
- Other

**Paso YTD**

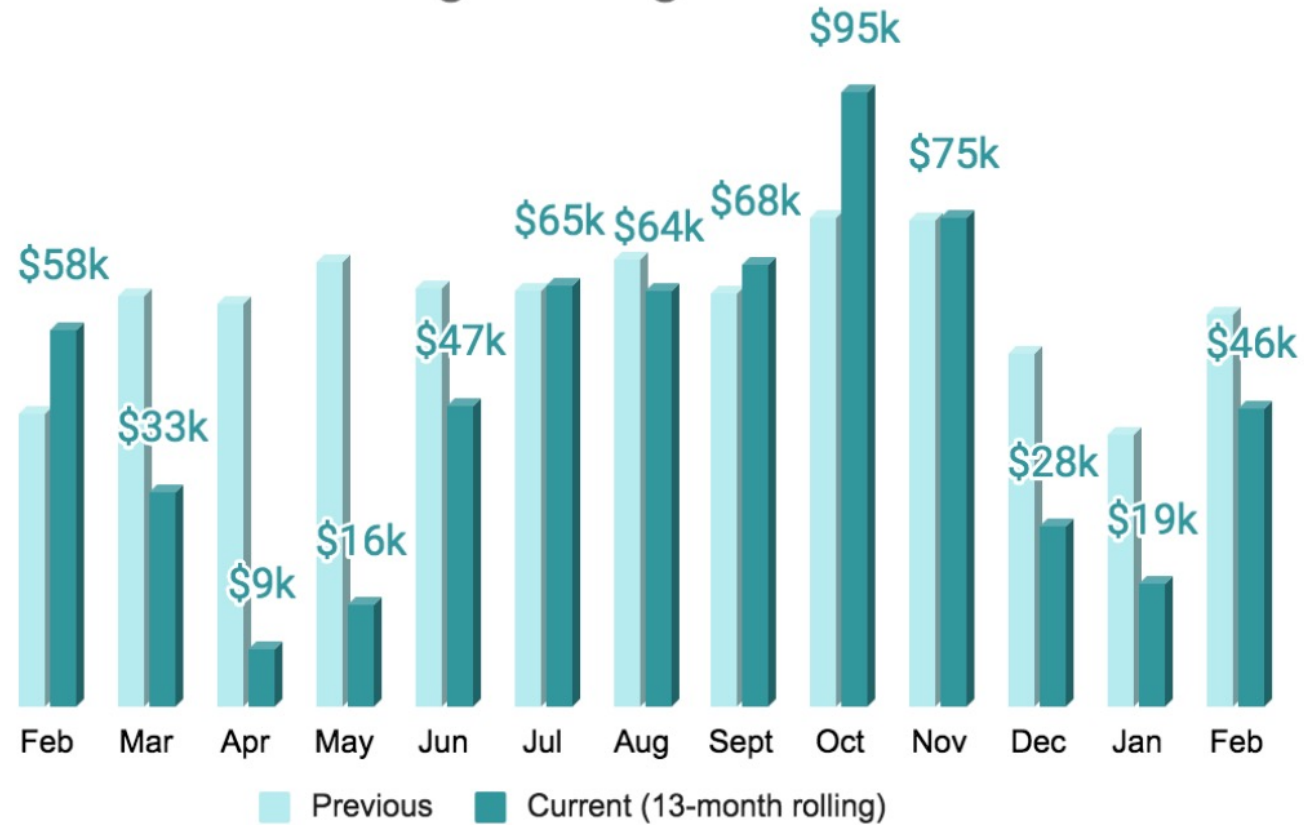


**ALL YTD**



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### Paso Average Tasting Room Sales



#### Tasting Room Sales % Change

	Paso	All
February	-26%	-38%
YTD	-37%	-50%



# Thank You

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Editor

**Wine Analytics Report**

[www.winesvinesanalytics.com](http://www.winesvinesanalytics.com)

**2021 Winery Direct-to-Consumer Shipping Report**

<https://www.sovos.com/shipcompliant/content-library/wine-dtc-report/>

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