



| The Urbanization of the Tasting Room
Creates Alternative DTC Channels



Panelists

Amber Karson

Founder & CEO, Karson Butler Events
and Lecturer, Cal Poly College of Agriculture, Food &
Environmental Sciences

Doug Margerum

Owner, Margerum Wine Company

Jenny Medina

Director of Tasting Rooms, Alpha Omega Collective

Johan Eide

Co-Founder & CEO, Region

Sabrine Rodems

Winemaker, Wrath Wines & Owner, Scratch Wines



RISE OF THE SATELLITE TASTING ROOM

08

2008

The pace of new tasting room openings increases and in 2008, the number of new tasting rooms opened officially beats out the number of new winery facilities.

19

2019

DTC sales represent 65 percent of an average winery's revenue. Most direct sales growth has taken place over the past decade and growth has accelerated during the last five years, driven by tasting rooms and clubs. More than 90 percent of urban tasting rooms in existence opened in 2003 or later; 40 percent have opened since 2013.



20

2020

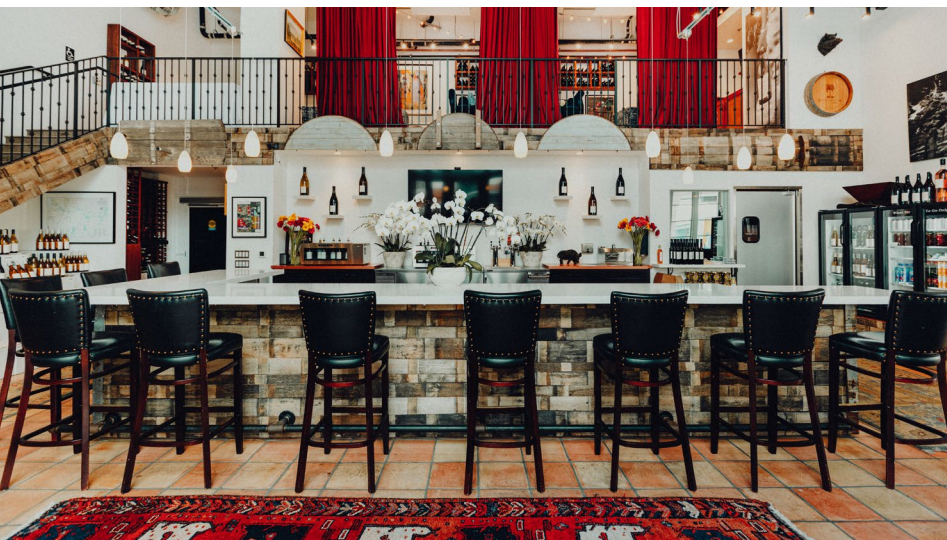
COVID-19 disrupts the world as we know it. Online beverage alcohol sales peaked in late April with a 551% YOY growth rate, with triple-digit growth continuing through the end of June. New customers are introduced to the world of wine... will they stay interested? What will they be looking for when they come back?

22

2022

WBM's Michael S. Lasky reports the Rise of the Satellite Tasting Rooms has reached a "tipping point" and are often concentrated in key urban areas near CA's wine regions. Top reasons for opening a satellite tasting room include limitations on # of visitors allowed, rising travel costs and lower visitor numbers, and/or ability to showcase multiple brands,





Santa Barbara Tasting Room
at Hotel Californian





Vineyard & Winery
Buellton, California



Region.

- redefining how wine is shared and connecting people to their Region through wine





ALPHA OMEGA

Collective

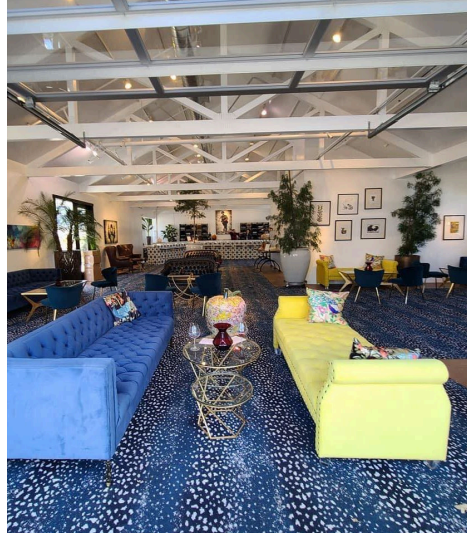
TOLOSA ALPHA OMEGA PERINET

Locations in Downtown Paso Robles, Napa, and Healdsburg





Paso Robles Location



Wrath SCRATCH

- Carmel Plaza
- Vineyard Tasting Room
- Carmel by the Sea

**WIV 20
23**