SVB 2020 Consumer Wine Sales Survey

The questions on this survey include many of the basic DTC metrics I feel wineries should be tracking. Save these instructions so you can run these reports again.

These reports assume that you are using our standrard recommended procedures, what we call the Fundamental Five.

**#1 What is your annual case production**

Purchases by Item Summary – This will show your bottle runs. If you also purchase wine, you will need to filter for the asset account for the wines that you make

**#2 What was the average suggested RETAIL price**

Sales by Item Summary, filter for your Tasting Room class – This assumes that you do not discount your tasting room sales.

**# 11 Estimate the average tasting room purchase in dollars for 2019**

 From your POS program, find the total number of tasting room orders/sales receipts

From QB: Profit & Loss Standard, show columns by Class – Look at your Tasting Room class. I would exclude shipping fees and things like event tickets.

**#12 How much do you charge for your standard and reserve tasting fees**

 Sales by Item Summary – Look for your tasting fees items

**#20 Estimate the average per person annual sales for wine club members**

 I could interpret this question in a few different ways. The method I show assumes you have several club tiers that you run two times a year. Add the average sale for each of those club runs/months to ge the total annual sales. You could also take your total wine club sales and divide by the average number of members who took an order. Note that the questions specifically says “members to whom wine was shipped”.

From your POS, find the number of members who took an order for each club run.

Wine Club Shipments - If you cannot get this from your POS

From QB: Profit & Loss Standard, filter for Wine Club and show columns by Month. Divide by the number of members that took an order in each month/run.

Additional purchases – To figure this out you would need to know what the base order for each tier is, then calculate the difference between the actual order and the “base”. I do not have a procedure to track the club members by club tier, so you will need your POS plus excel to figure this out.

**#25 What percentage of oveall wine sales are direct?**

Easy method: Profit & Loss Standard, filter first for the DTC classes. Write down the total wine sales. Change the filter for the Trade classes, and note the total wine sales. Then calculate the %

Spiffy method: Custom summary report, display rows by class, check the % of column box, filter for your wine sales account. Add the percentages for each group.

**#26 What is the breakdown of your Direct to Consumer sales**

Easy method: Profit & Loss Standard, show columns by Class, filter for the DTC classes and for the typical tasting room sales accounts (similar to #11)

Spiffy method: Custom Summary report, display rows by class, check the % of column box, filter for your typical tasting room sales accounts (as in #11) and filter for only the DTC classes

**#27 What was the annual percentage change in DTC sales in 2019 compared to 2018**

Profit & Loss Standard, filter for the DTC classes and for the typical tasting room sales accounts. Check the box for “Previous Year” and “% change”