

Wine Consumption Trends and Attitudes

Navigating the Generational Shift to Gen X and Millennials

May 2024

Presented by





00 INTRODUCTION

01 THE RESEARCH

02 CONSUMPTION HABITS

03 VARIETY AND CHOICE

04 PURCHASING HABITS

05 OPINIONS ON WINERIES AND WINE CLUBS

06 ATTITUDES AND BELIEFS

07 SUMMARY AND CONCLUSIONS

The background features two large, overlapping white ovals at the top. Below them, a series of thin, light gray wavy lines curves across the bottom half of the page. The word "Introduction" is centered in a bold, dark gray font.

Introduction

These are interesting times. Only the very lucky or obtuse are not keenly sentient of the downturn currently affecting the wine industry. Therefore, we will dispense with an extensive recap of the market headwinds and simply summarize it:

- Silicon Valley Business predicts total wine category sales will remain negative in 2024.
- NielsonIQ reports sales by wineries to restaurants are declining as wine becomes more expensive than cocktails.
- Cannabis is having an impact. According to the National Institute of Health, 29% of 19-30-year-olds enjoyed cannabis in 2022 versus just 16% of that age group in 2012.
- Anti-alcohol messaging from WHO and others is affecting post-Boomer age groups, with 52% of 21-34-year-olds believing any alcohol is bad for your health.

We know we need to change. But what, exactly, and how do we pivot to address these issues?

So WineGlass Marketing did something we've never done before: we commissioned our own research.

What we found out was fascinating.

01

The Research



With this research, we wanted to understand what resonates with newer consumers. Evidently, the programs we've carefully curated for Baby Boomers are not resonating with younger generations. So what will?

We targeted only wine drinkers, rationalizing that they are the lowest-hanging fruit to attract because someone who isn't drinking wine at all will need to be sold on the entire category. We weren't looking to convince people to drink wine; we wanted to know how to make our client's wines attractive and the preferred choice.

We focused just on the next two generations for the same reasons. We don't talk enough about what Gen Xers want, and everyone keeps saying Millennials are so important, so let's ask them some questions. Note that we're not saying Gen Z isn't a potential target, but we focused on the nearest targets for this study.

We hired Quest Mindshare to help us with the survey and then field the panel to confirm we had a statistically significant number of replies. Our survey went to 1,613

Total US Wine Consumers: 771

Millennials (aged 28-42 years old) and 842 Gen X (aged 43-59). Please note, all respondents were in the US, and we took care to have an equal distribution of locations across the US, as well as in urban and rural areas.

We had a hypothesis: It wasn't about the wine. Like all wine consumers, these consumers would evaluate wine choices based on price, varietal, and taste. However, for these consumers, wine culture and experiences, as we currently frame and explain them, are not attractive to them. The industry isn't as relevant or exciting to them and doesn't connect to their interests and lifestyles.

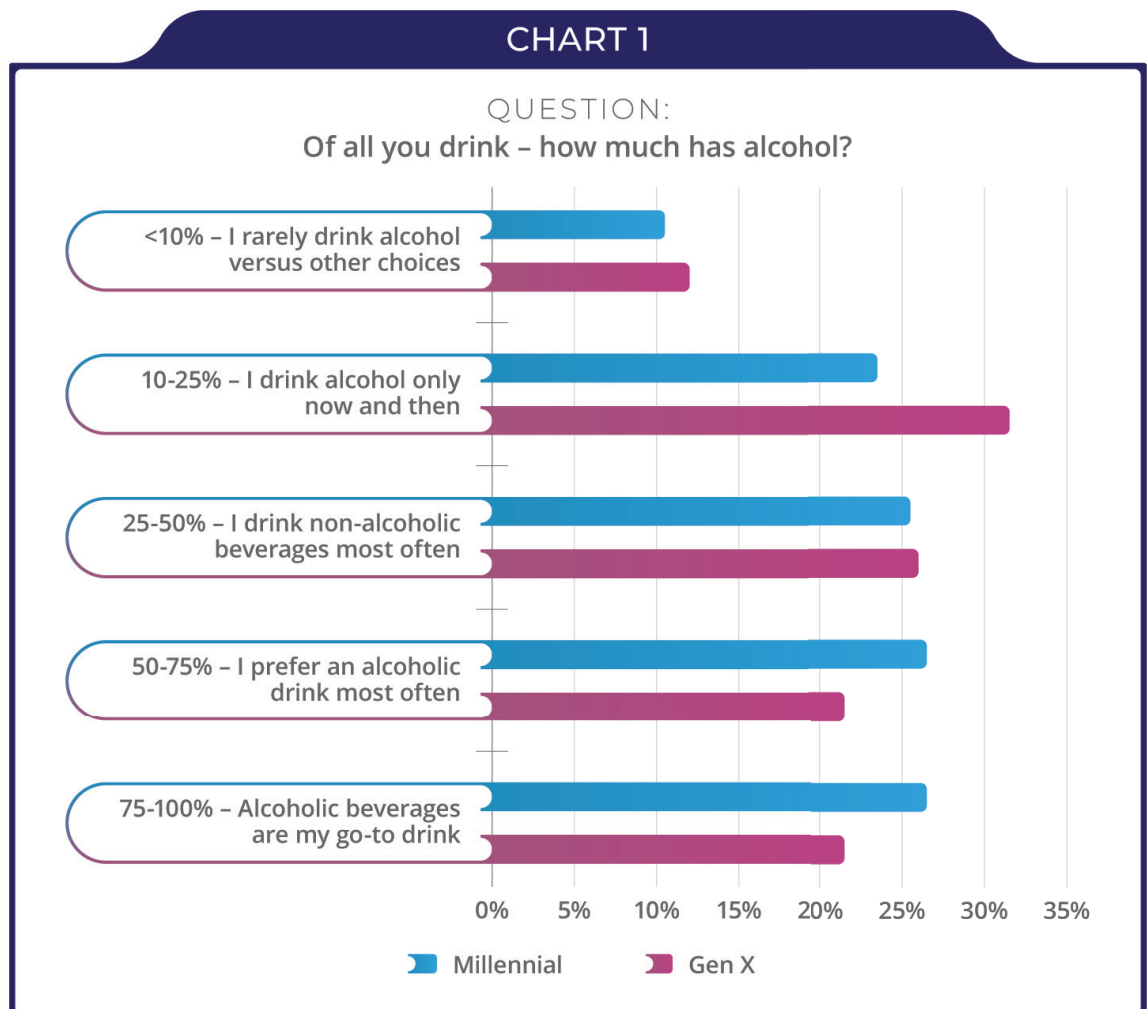


02

Consumption Habits



Since we only targeted wine drinkers, we can assume that they all drink alcohol, but we were surprised by how frequently they drink. We asked, “Of all your beverages, how much alcohol is in them?” 26% of Millennials responded that they drink alcohol 50-75% of the time, and Gen X peaked at 32%, reporting 10-25% of the time. So, there seems to be plenty of opportunity to make your wine the preferred choice if they’re grabbing alcohol 10-75% of the time.

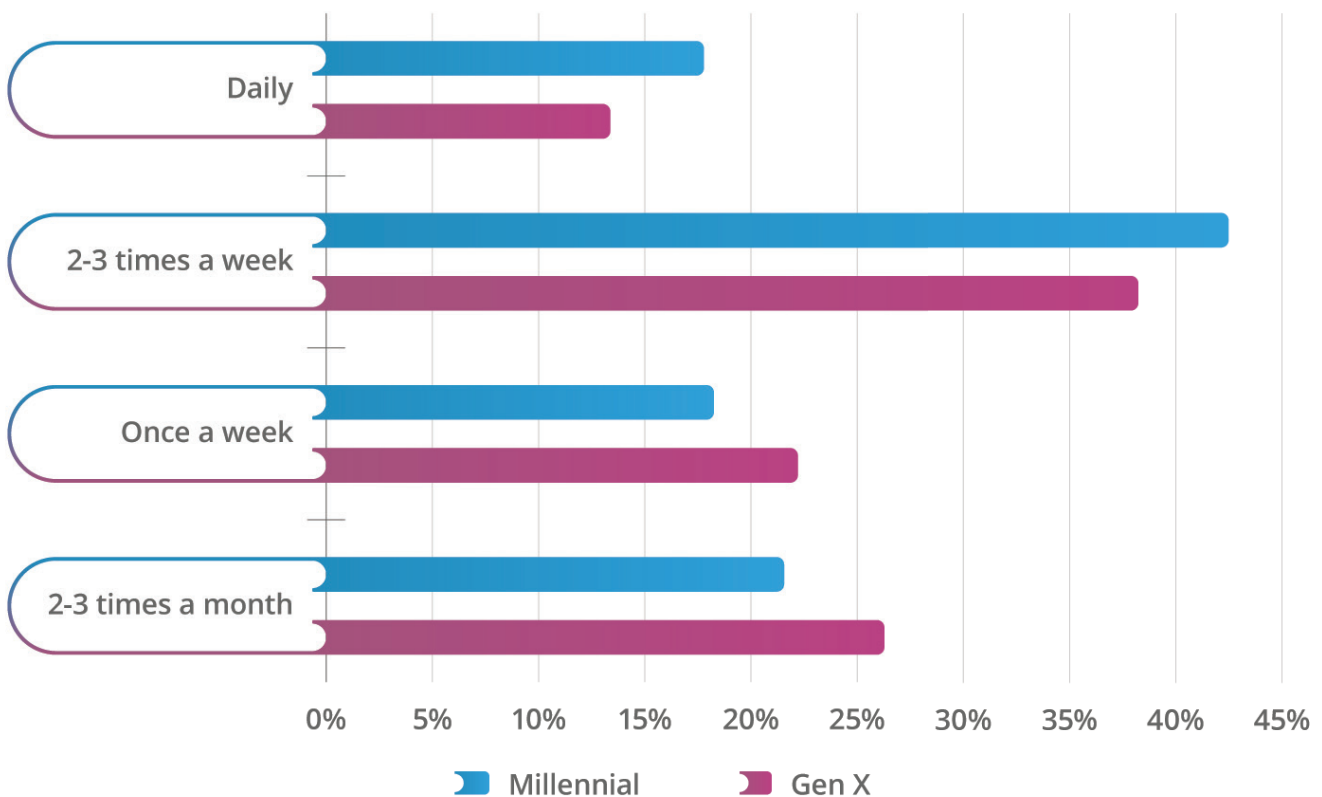


We also wanted to know, as they reached for that alcohol, how frequently their beverage of choice was wine. Both reported that wine was their beverage of choice 2-3 times a week. Gen X seems to favor wine slightly less, ranking stronger at the less frequent once a week to 2 to 3 times a month. 18% of Millennials reported drinking wine daily, as did 13% of Gen X.

CHART 2

QUESTION:

How often do you typically drink wine?



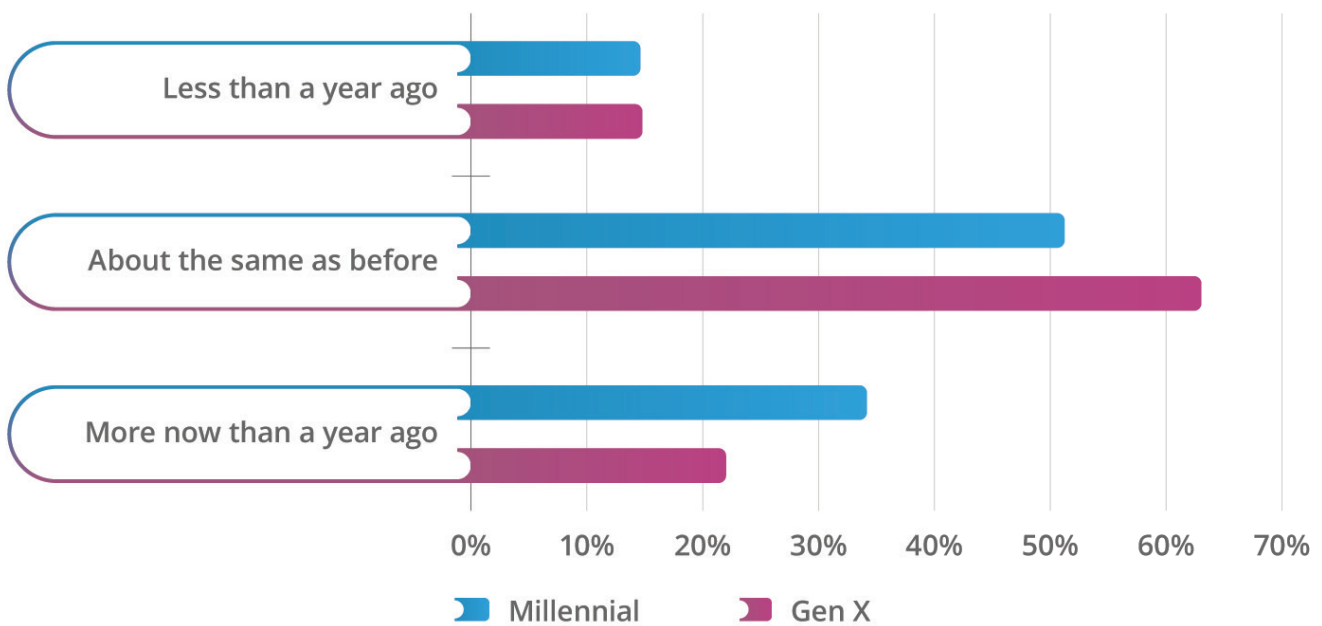
SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

To determine whether the new “health messaging” is taking root, we asked if their consumption slowed.

The majority of respondents are drinking the same as a year ago, but 35% of Millennials and 22% of Gen X reported drinking more.

CHART 3

QUESTION:
Do you currently drink wine...?

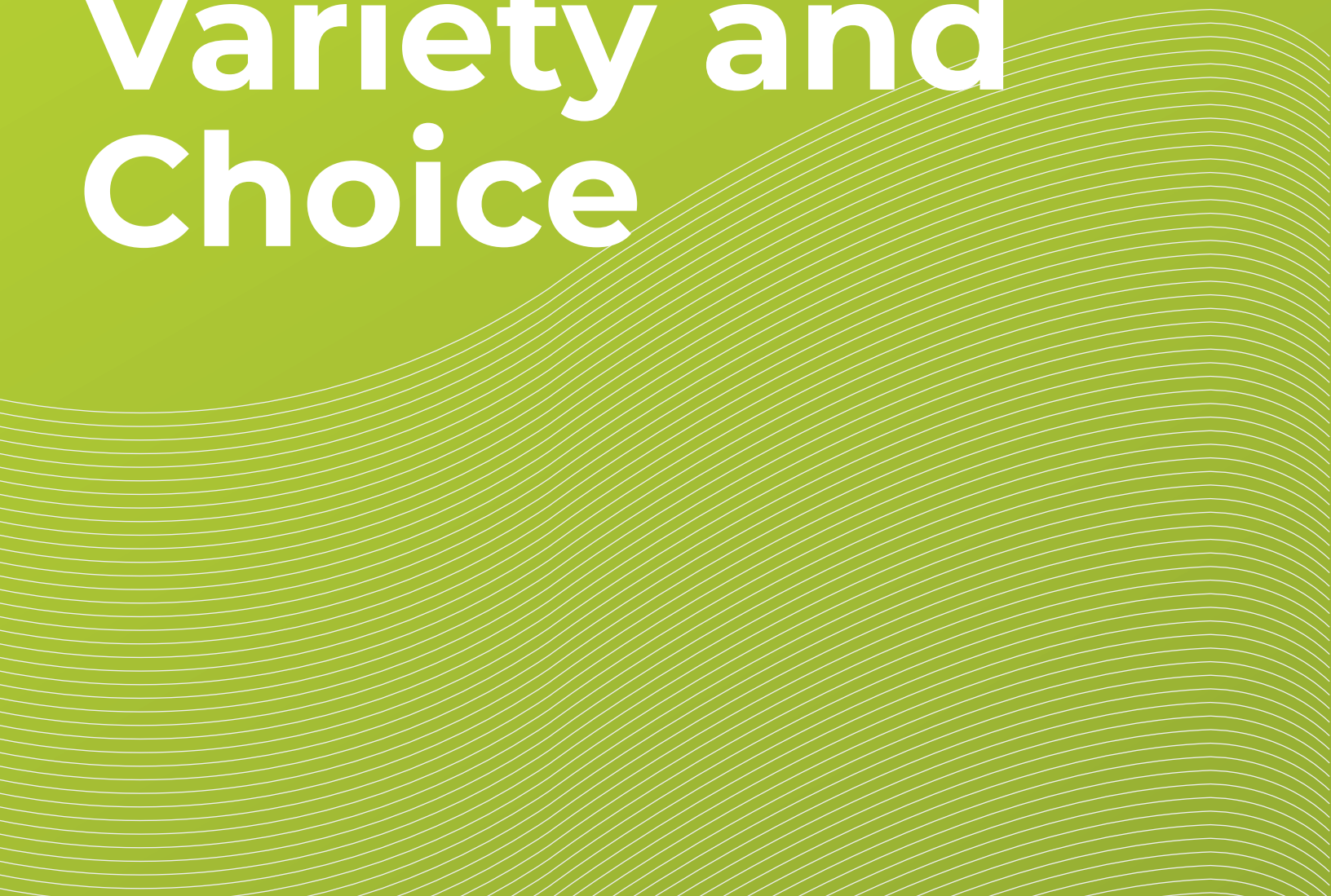


SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

All of this is very positive. And remember again, we focused on the lowest-hanging fruit—existing wine drinkers. So, this isn't to say people who don't drink wine are being affected by the current negative press, but it doesn't appear that this group of wine drinkers is slowing down anytime soon.

035

**Variety and
Choice**

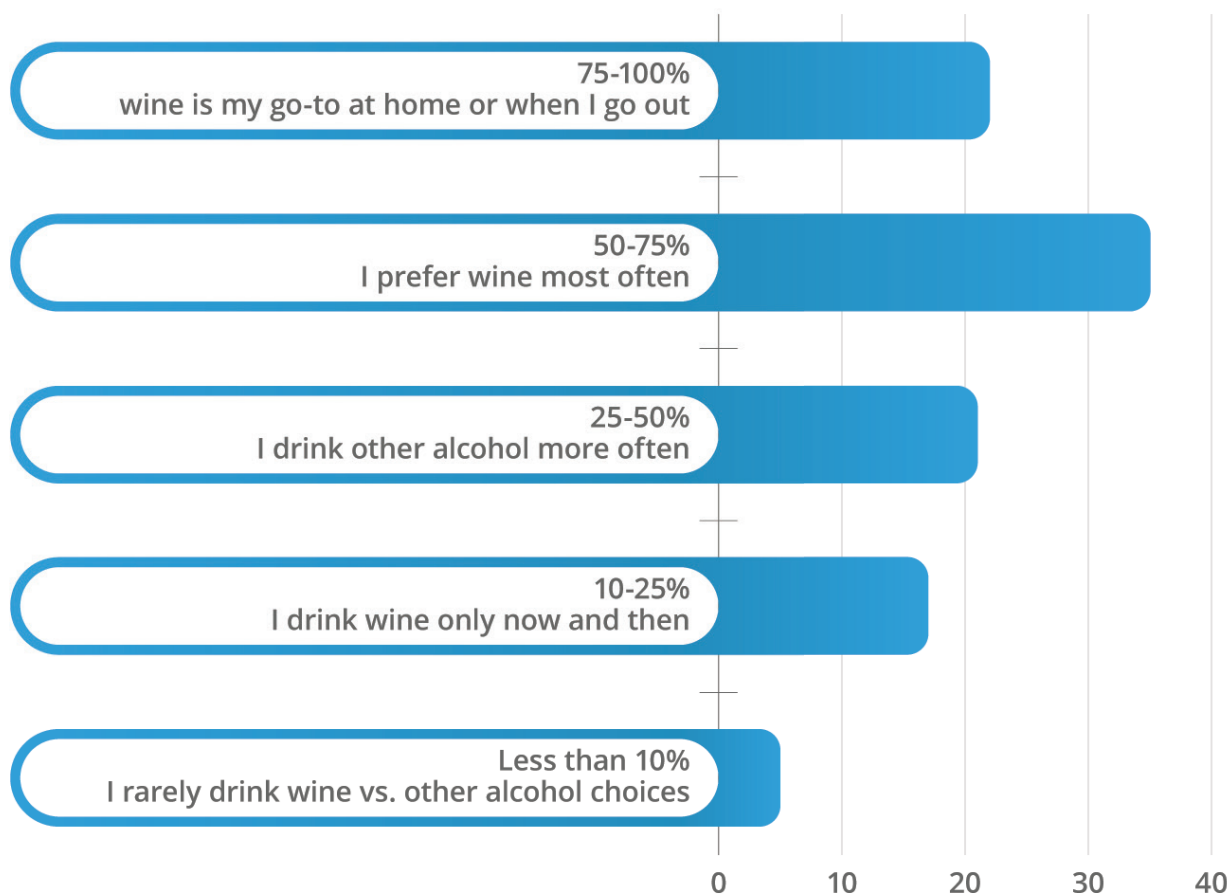


When asked about preferences, both Gen X and Millennials were very similar in their choices, so we added them together in this chart. We can see that even though they drink a variety of alcoholic beverages, wine is the preference in this study 36% of our respondents said they prefer wine 50-75% of the time, and almost a quarter of our respondents said that wine is their go-to drink 75-100% of the time.

CHART 4

QUESTION:

Of all the alcohol you drink in a month, any kind anywhere, how much usually is wine?

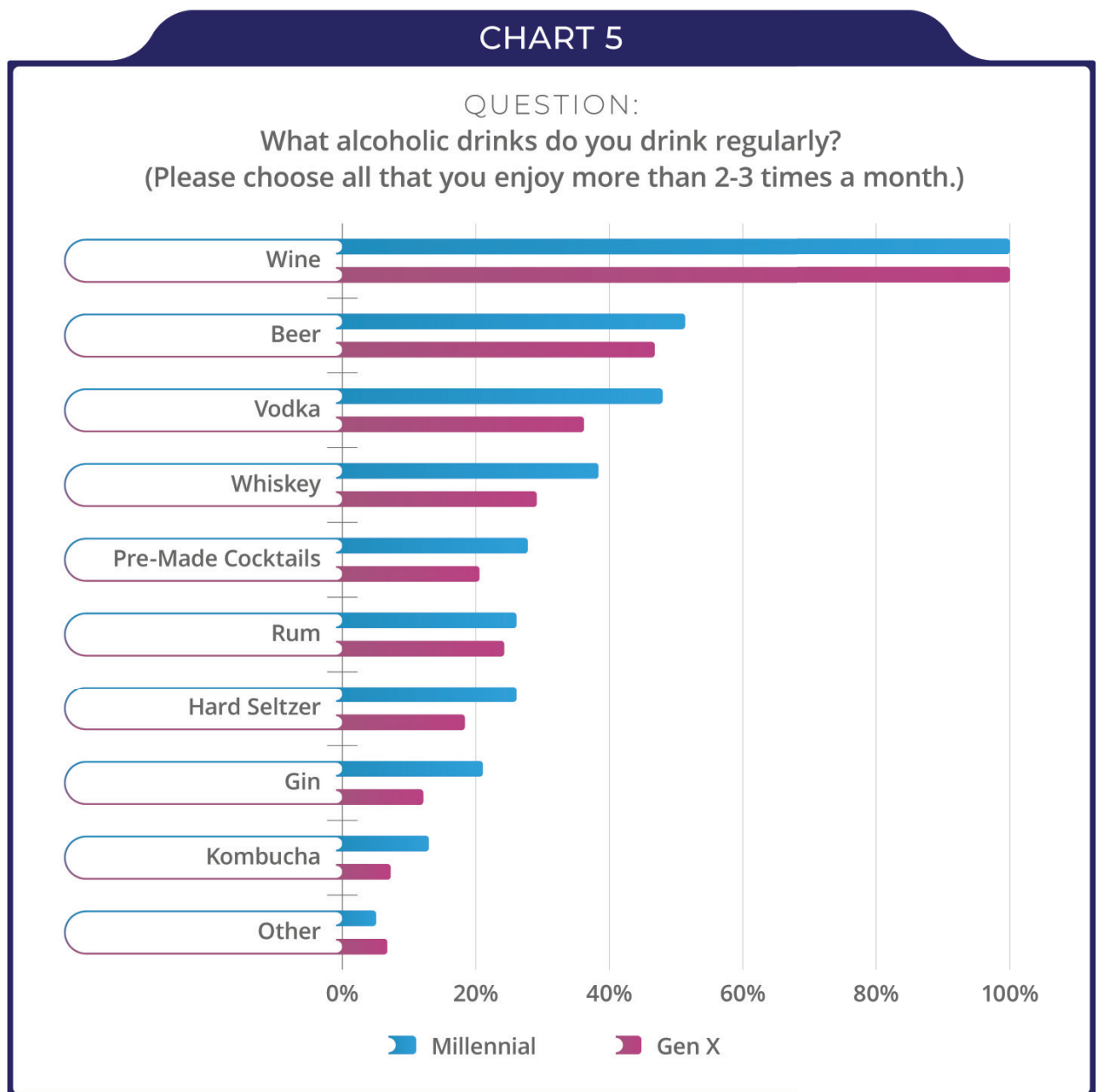


SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

Please do remember that our survey pre-qualified wine drinkers, so the takeaway here is that habitual wine drinkers prefer their wines to other alcohol.

Perhaps our industry should focus on feeding their need for variety with our own wines and not worry about what else they drink.

They've broken the binary of either/or to embrace "what else is there."



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey



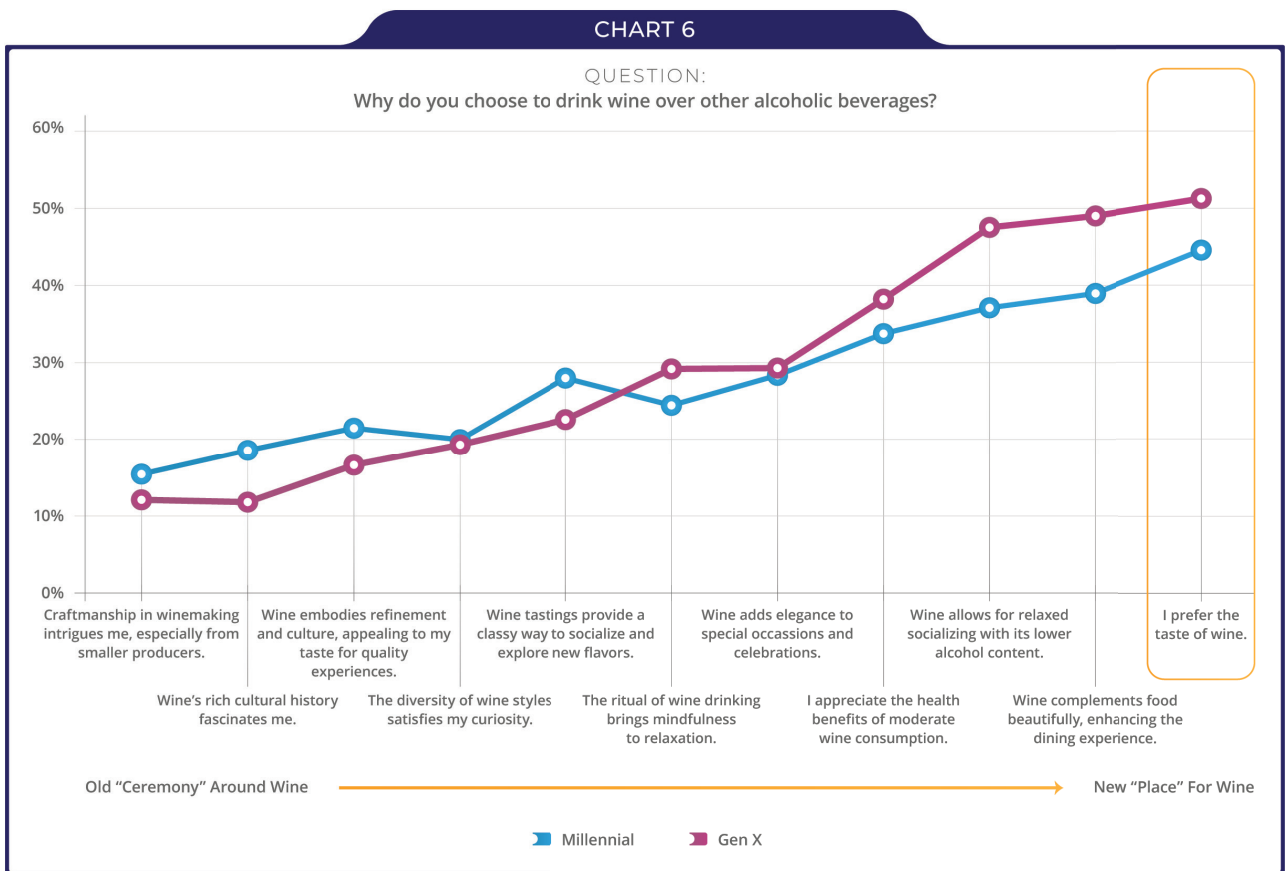
But they do like to vary their choices. When asked what alcoholic beverages they consumed, of course, 100% of our survey reported wine. But what follows is a long list of other adult refreshments. Beer came in a strong second with 47% of Gen X and 51% of Millennials regularly reporting consumption, with Vodka a third choice with 36% of Gen X and 48% of Millennials.

Knowing that on average, one of every two drinks for this target is alcohol and that wine is chosen 2-3 times a week, it is clear these consumers really like a choice. (Which makes sense if you think about it: they grew up with the internet and were exposed to many choices since birth.)

Perhaps our industry should focus on feeding their need for variety with our own wines and not worry about what else they drink.

At the risk of making too fine a point, we asked, “Why do you choose wine over others?”

Not surprisingly, the highest response was taste. The rest of the reasons we charted from least reported to most reported include qualities such as craftsmanship, the cultural experience, the ceremony around tastings, and moving into the moderation of alcohol and food pairing.




SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

We noticed a continuum of the “old” beliefs around wine on the left; we’re supposed to admire wine’s technical constitution and solemnly appreciate wine-tasting rituals. On the right, we move toward a new casual enjoyment and connection with comments like “relaxed socializing” and “enhancing food.”

It seems clear that the new “space” for wine in these consumers’ minds is not the highly cultured and crafted experiences of luxury but those of joy and connection.

We can also see that the old context didn’t resonate with Gen X, and they reacted more positively to the newer statements, whereas Millennials seemed to be a bit more traditional.



It seems clear that the new “space” for wine in these consumers’ minds is not the highly cultured and crafted experiences of luxury but those of joy and connection.





Purchasing Habits



When you think of consuming wine, what image appears in your head?

We often imagine someone in a thoughtful pose, looking out into the sunset from their porch or curled up by the fire with a glass of Cabernet.

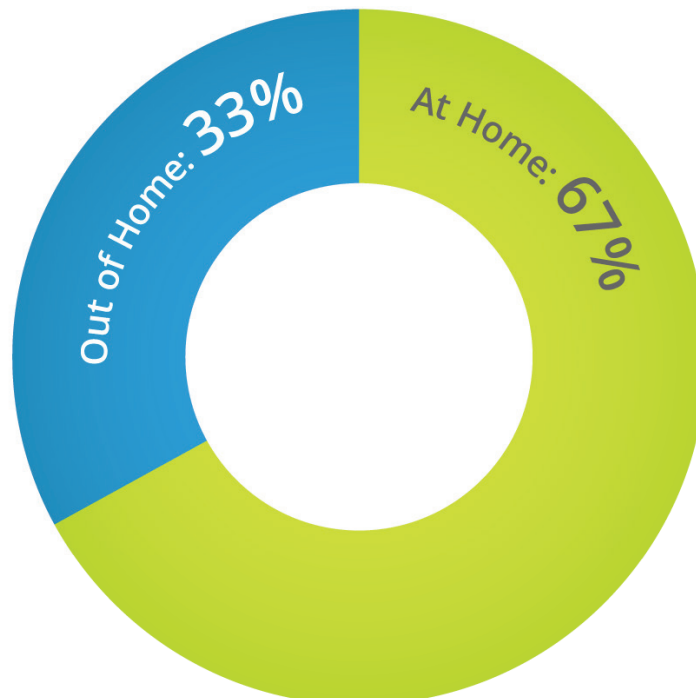
We have the setting right, as 67% of respondents reported consuming wine at home versus 33% out of home.



CHART 7

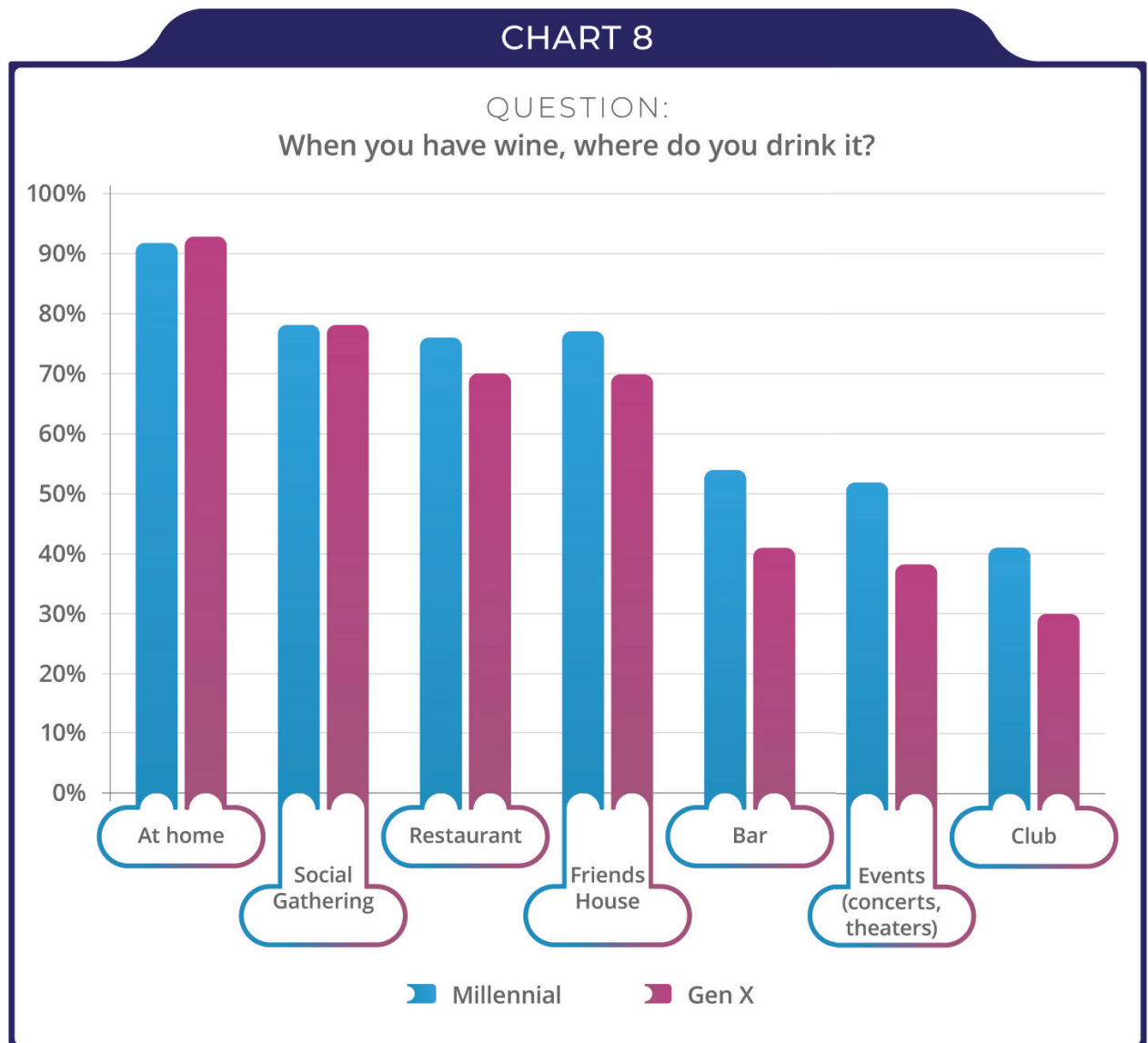
QUESTION:

What would you say is the split between having wine at home vs. all other places you drink it?



However, this group’s consumption is decidedly social. Both Gen X and Millennials associate wine with various social activities, including eating out and visiting friends’ houses. Millennials even associate wine with concerts, the theater, and going to clubs.

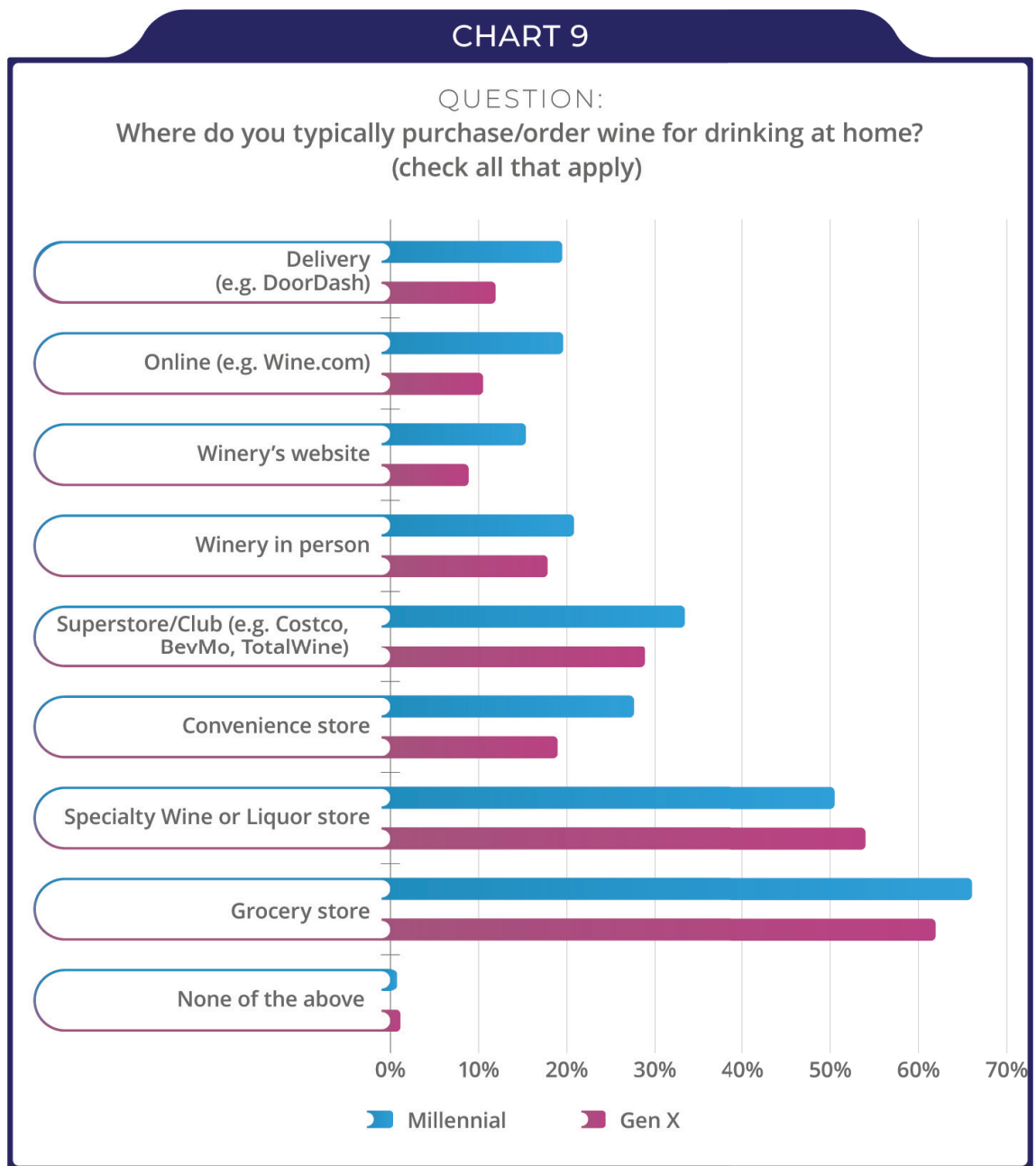
This indicates that wineries would be smart to divert some of the ad budget earmarked for driving traffic to the tasting room and spend it on programs to meet consumers in their local markets.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

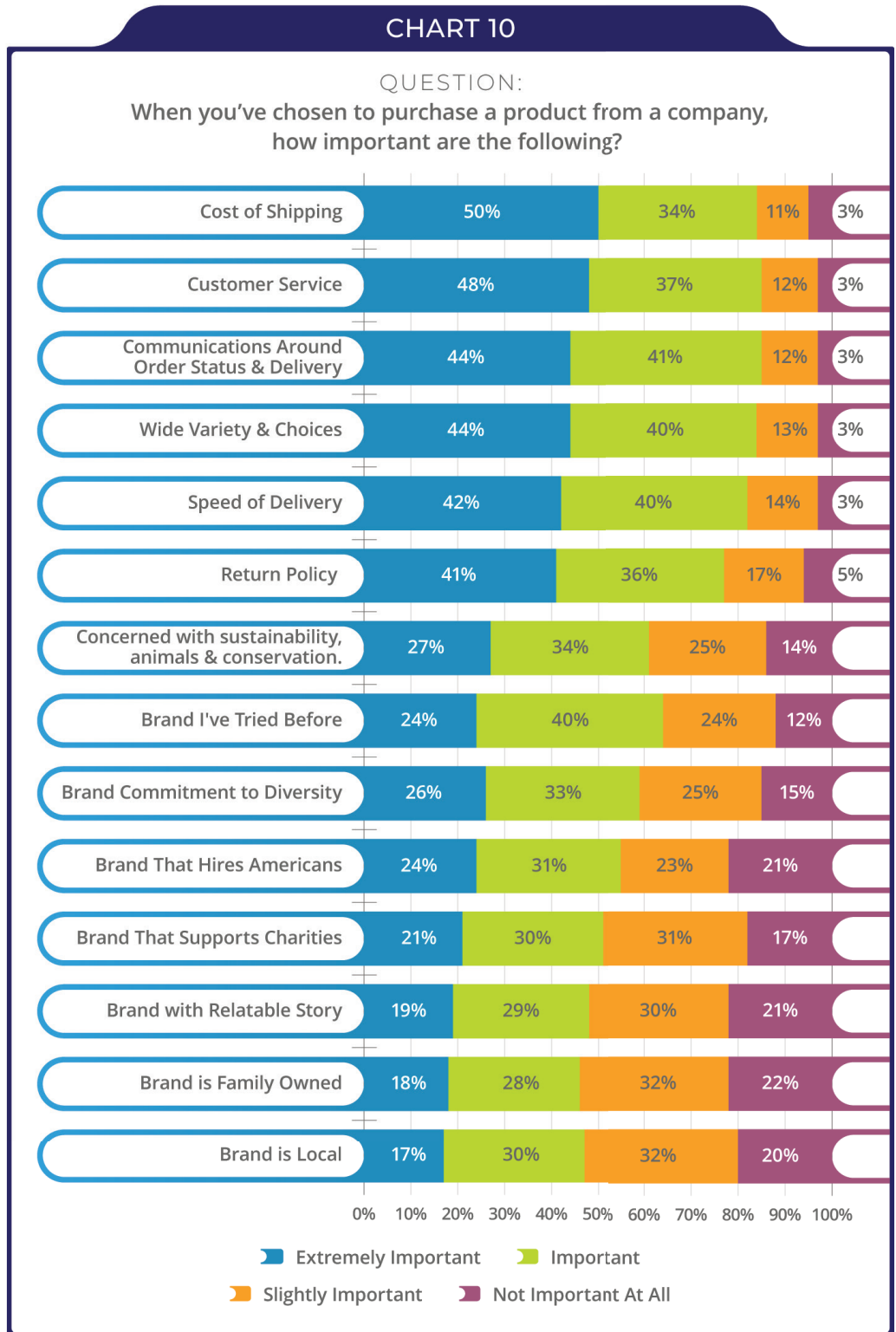
Of course, eCommerce is another major sales channel to address. Millennials in some places were twice as likely to shop online channels as Gen X. They reported high adoption of internet sales channels such as delivery apps, online retailers, online wine clubs, and winery websites.

Both groups still primarily buy wine at retail. Millennials lead at superstores, convenience, and grocery stores, with Gen X slightly preferring wine or specialty stores.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

We listed company attributes and asked them to rank their importance on a five-point scale from “Extremely Important” to “Not Important At All”.



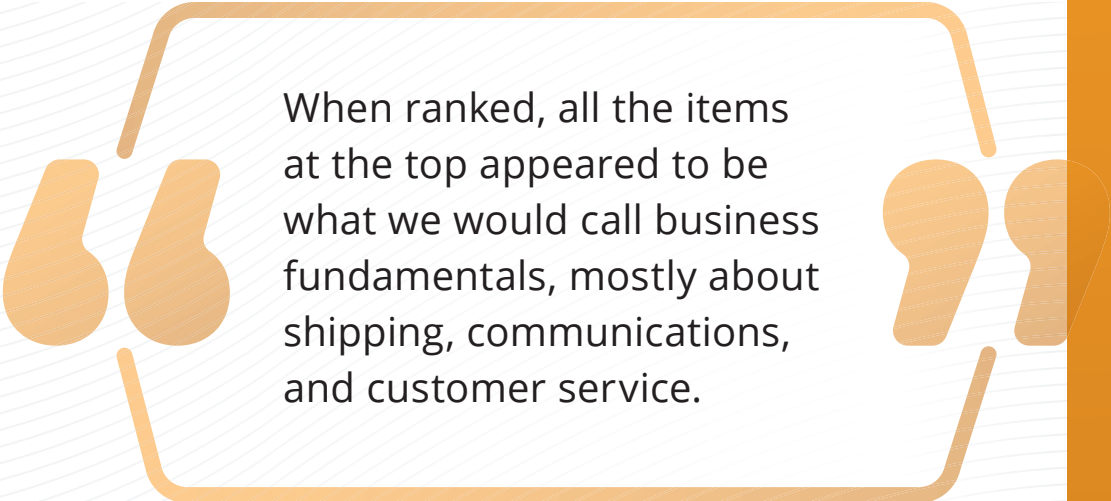
SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

When ranked, all the items at the top appeared to be what we would call business fundamentals, mostly about shipping, communications, and customer service.

Note, too, that we asked for “overall” company attributes, not “eCommerce” company attributes, yet the first quality they want is shipping. This gives us insight into how important that has become for today’s consumers.

Some less critical items were the touchy-feely brand attributes like choosing local, family-owned, US-based, diversity-committed sustainable brands. We all agree these are great, but they don’t trump basic good business practices for consumers.

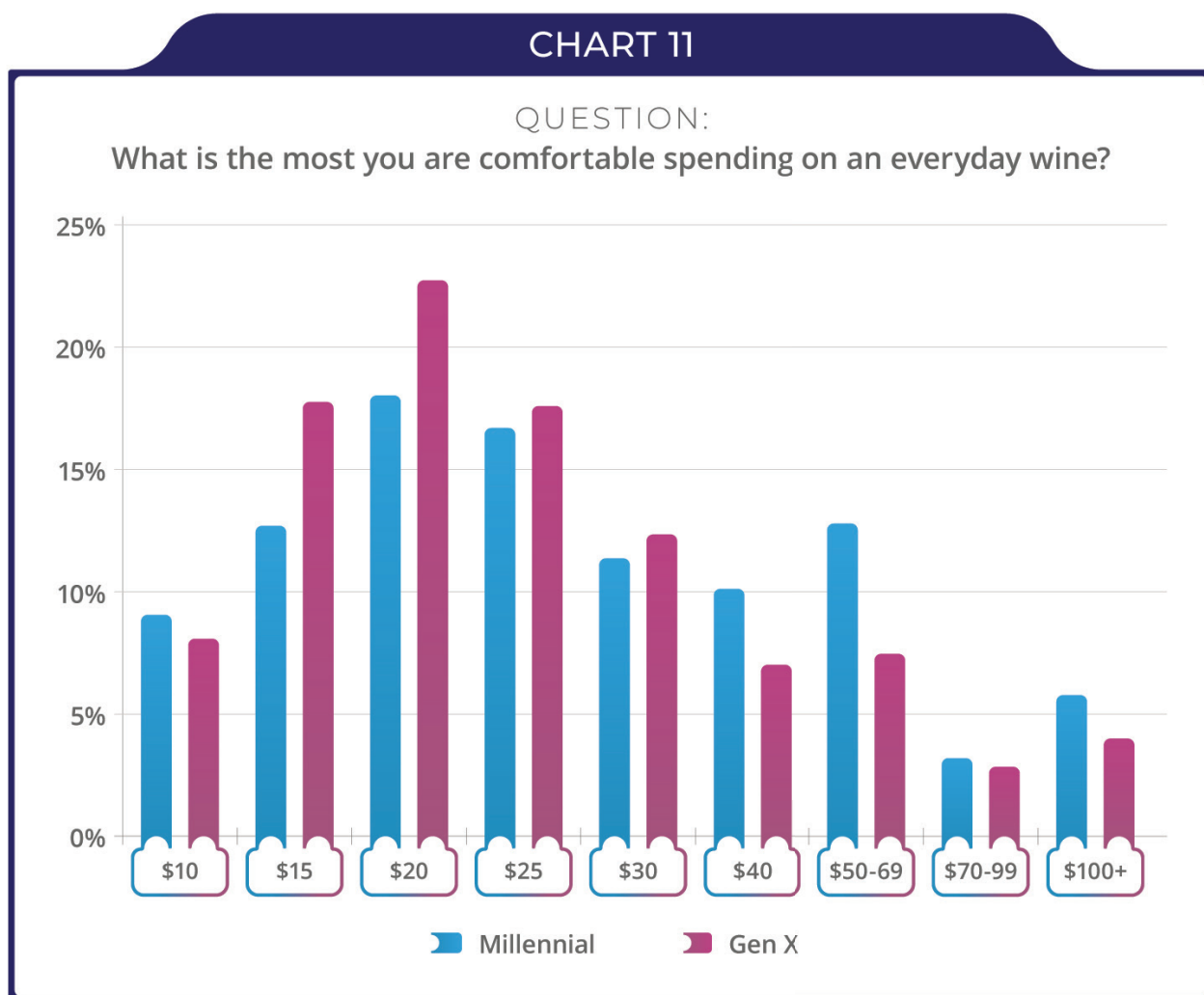
So, a vital takeaway here is that these are intelligent, educated consumers. They are used to Amazon and won’t accept sub-par delivery, customer service, and communications.



When ranked, all the items at the top appeared to be what we would call business fundamentals, mostly about shipping, communications, and customer service.

Let's address the elephant in the room: the money question. Would it surprise you that Millennials are more comfortable spending more than \$40 on wine?

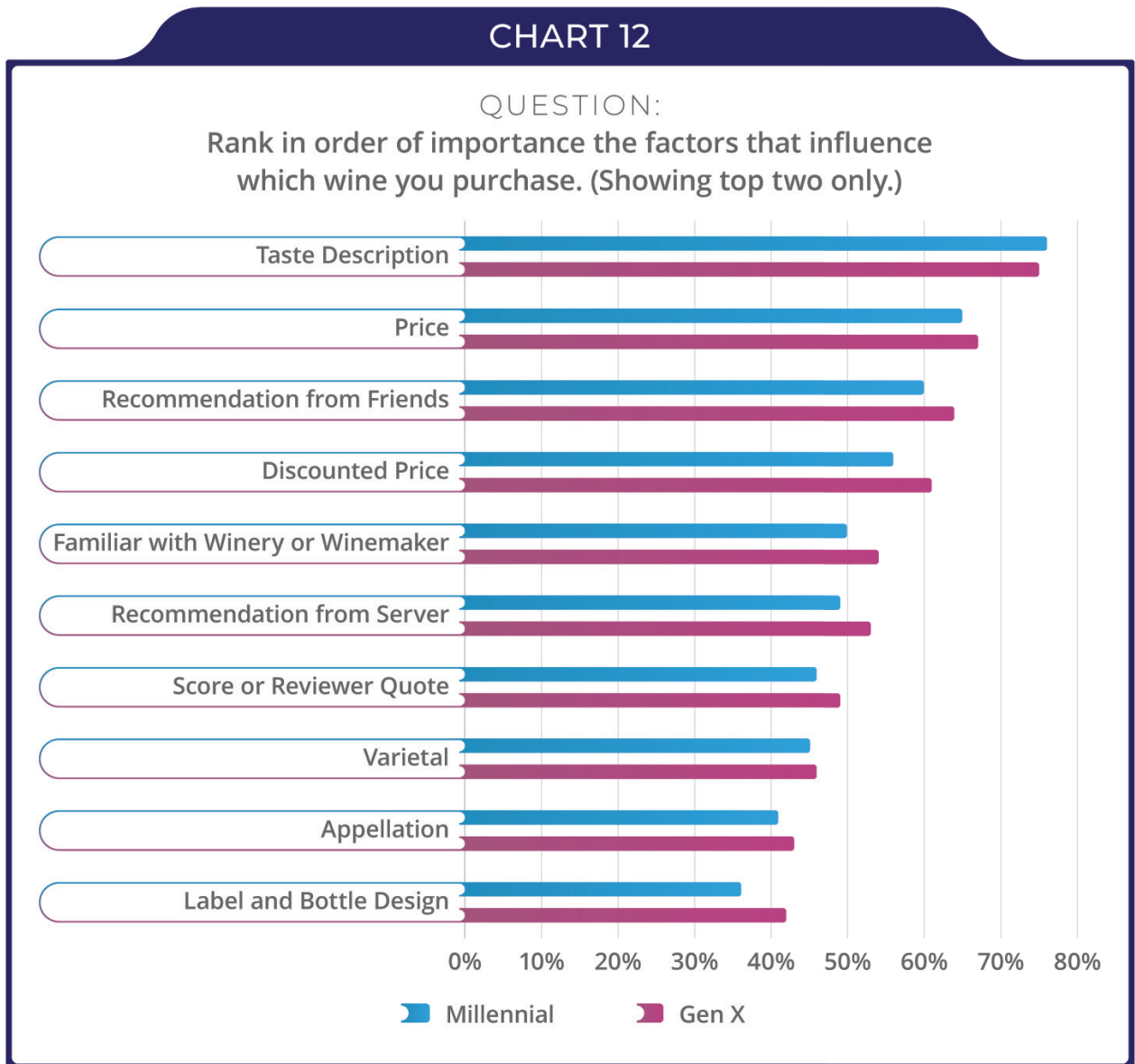
When asked what their everyday wine price was, both said around \$20. But look at the \$40 and up category and how Millennials are so much more comfortable there! Then, look at the under \$25 marks and how Gen X dominates. The net takeaway is that while \$20 is still that sweet spot for both groups, Gen X is reportedly cheaper than Millennials.



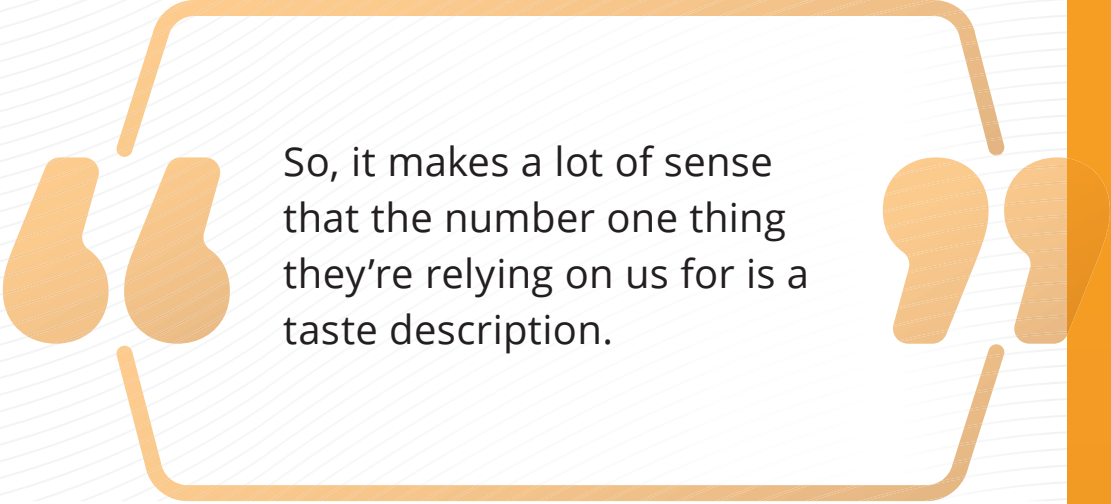
SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey



We then asked them to rank tools that help push them toward a purchase. This graph shows the “very important” and “somewhat important” responses.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey



So, it makes a lot of sense that the number one thing they're relying on us for is a taste description.

A few pages ago, we learned there is a base-level requirement for good-tasting wine to get into the consideration set, so we know taste is essential. However, we also see that this group is comfortable buying wine online before tasting it.

So, it makes a lot of sense that the number one thing they're relying on us for is a taste description.

One cannot emphasize enough how vital well-written tasting notes are to online business. These tools should be thoughtful and descriptive, contain as much information as possible, and be readily available at eCommerce for every wine, not just for the trade.

After consumers understand what the wine will taste like, they look at price, word of mouth, or familiarity. Some specific product attributes essential to Baby Boomers, like technical specs, do not resonate with these younger consumers.



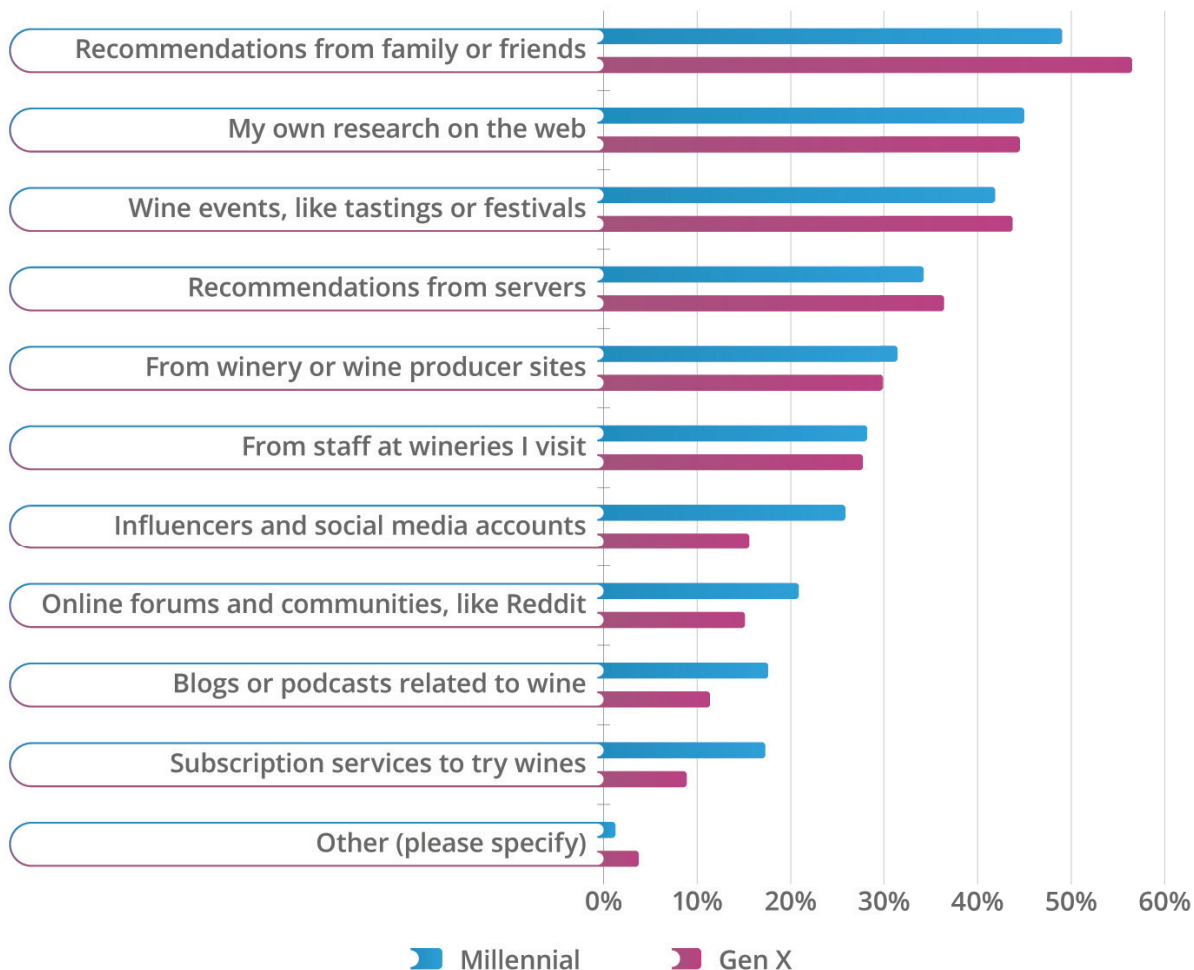
Continuing this line of questioning, we asked them where they get their information. Friends came up again, but we were surprised the second was their own research on the internet. This again, underscores the importance of complete, descriptive tasting notes and an easy-to-navigate website for this group of consumers.

Interactions with the brands at events, from servers to the winery websites, all come before visiting the winery itself, influencers, blogs, or subscription services.

CHART 13

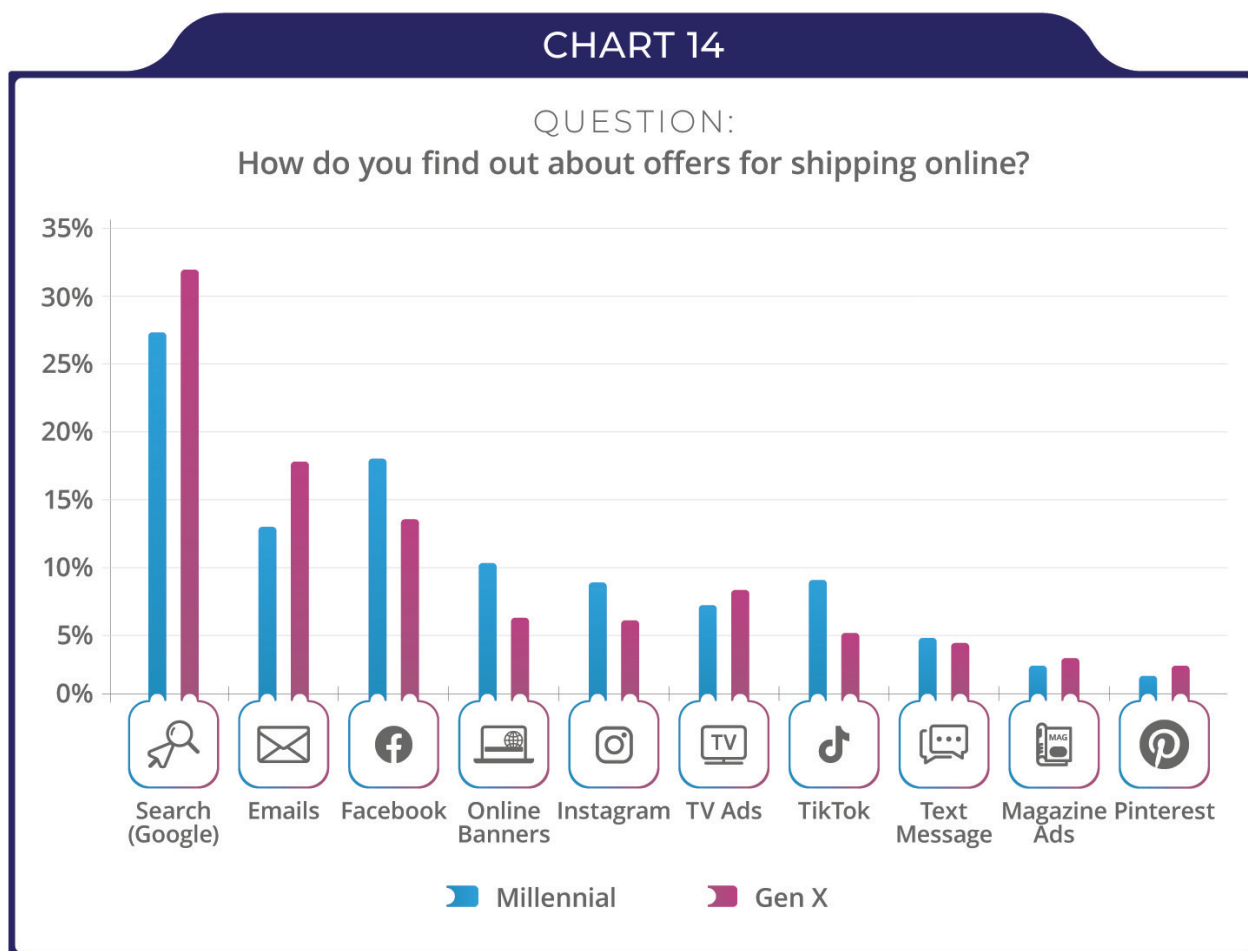
QUESTION:

Where do you prefer to get information about wine and/or wineries?
(Choose all that apply.)



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

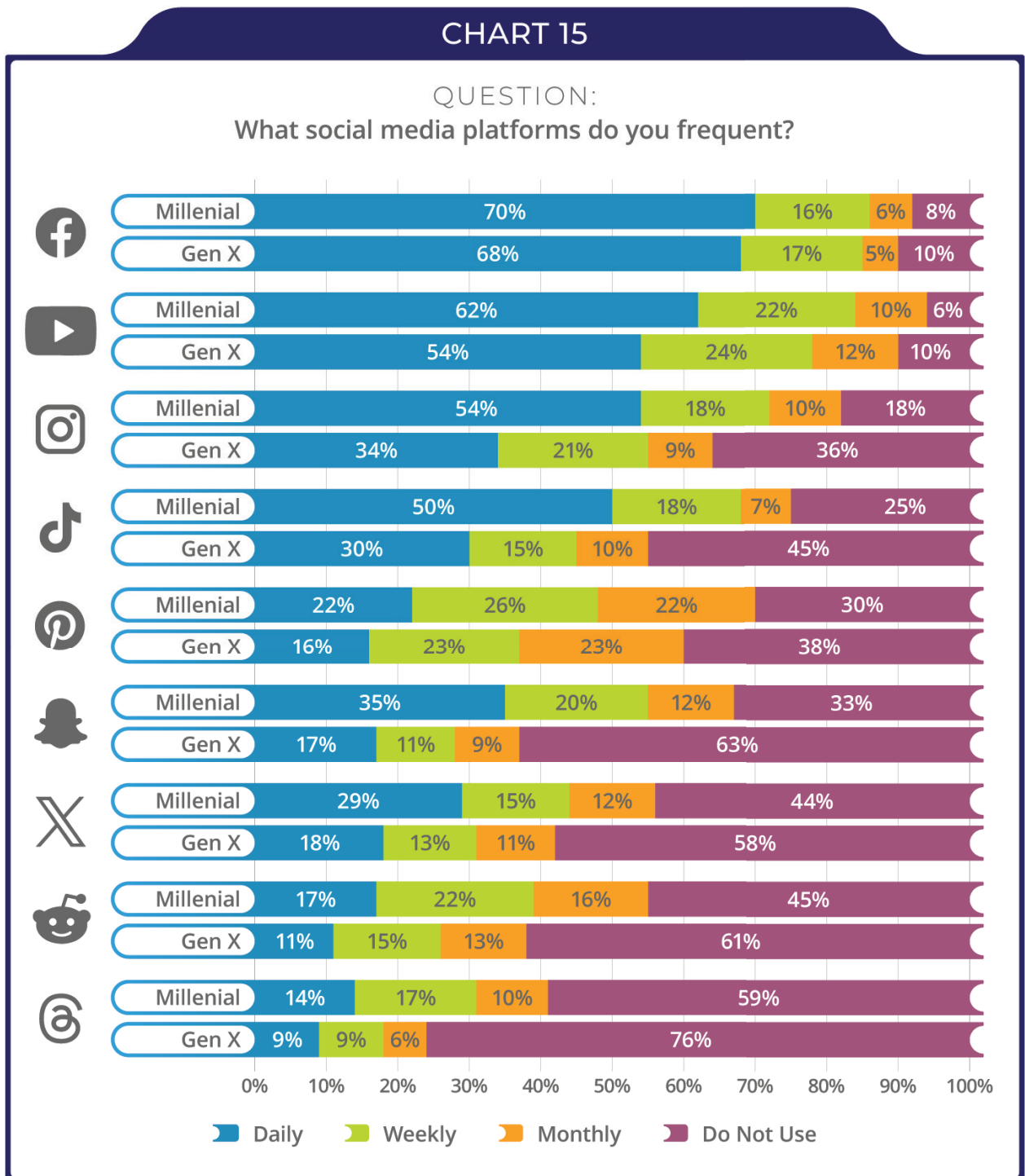
We asked them what effect specific marketing channels had on their choices, and the top three by far were searching on Google (or other search engines), emails, and Facebook.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

Gen X is more comfortable on Google and with emails, while Millennials are more apt to use social media platforms. TV ads remain the most influential “traditional” channel and TikTok ranked low with Gen X but 5th with Millennials. Texting was reported by 4% of each audience and Magazine Ads and Pinterest appear to have the least impact.

Speaking of social media, we asked about social media usage and gave them four options: they are on this channel daily, weekly, monthly, or not on it. We indicate both customer groups on the graph, but the colors are the same.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

Overall, Facebook and YouTube dominate for both audiences, and neither is too enamored with Reddit or Threads. There are some similarities but also significant differences between them. Instagram, while the third strongest for both and TikTok the fourth, have significantly stronger blue bars for Millennials over Gen X. Pinterest, Snapchat, and Twitter/X fall in a mixed bag.

Net, if you want to consolidate your messages – focus on the top three or four channels.

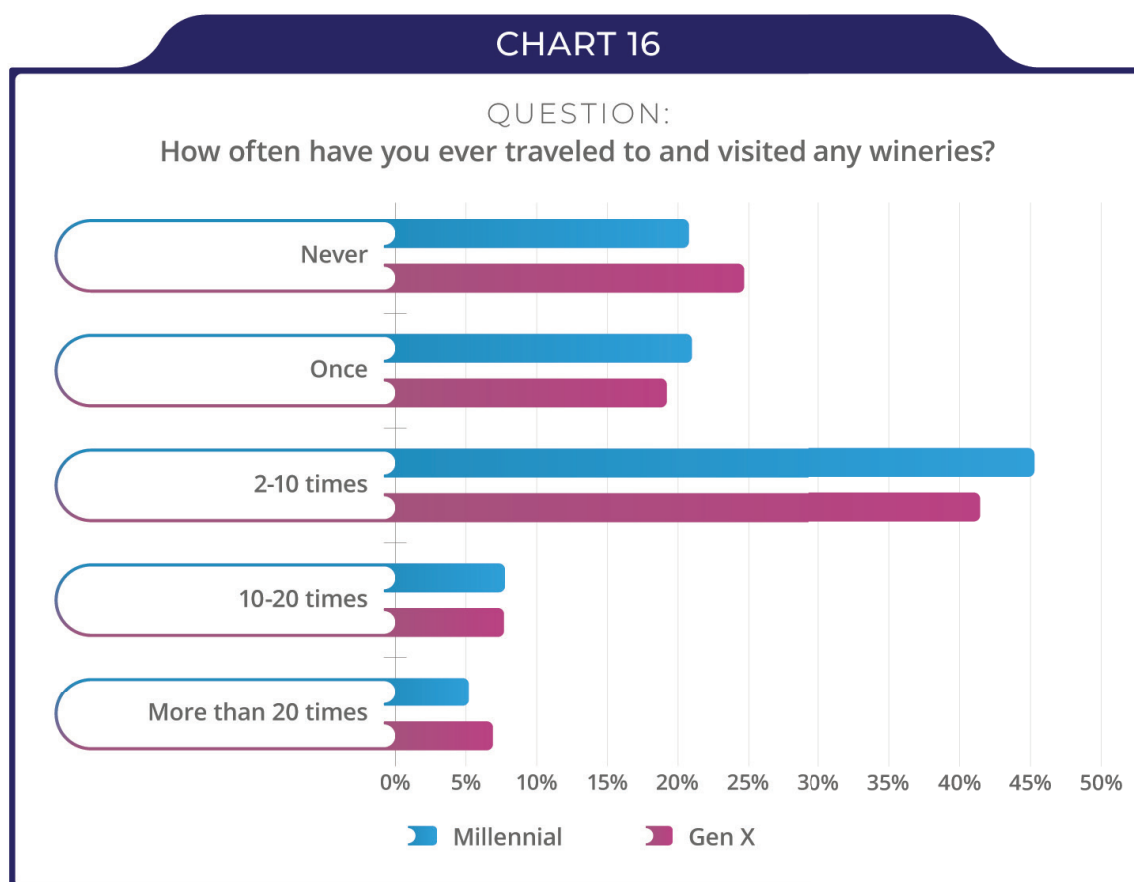


05

Opinions on Wineries and Wine Clubs

This page shows surprising data and one of the key findings of this report. These are good, frequent wine consumers; **about a quarter of them have never been to a winery.** To reach these audiences, we must change the mindset that tasting rooms are the center of the DTC business. Tasting rooms were vital for Baby Boomers, who needed proof and wanted to do research. However, Gen X and Millennials don't need to see where a couch is made to buy it on Amazon; they read the descriptions and ask their friends about it. They don't need to go to the place or origin or learn everything there is to know about a product to buy it.

That said, 75% have been to wine country, and most have been between 2 and 10 times.

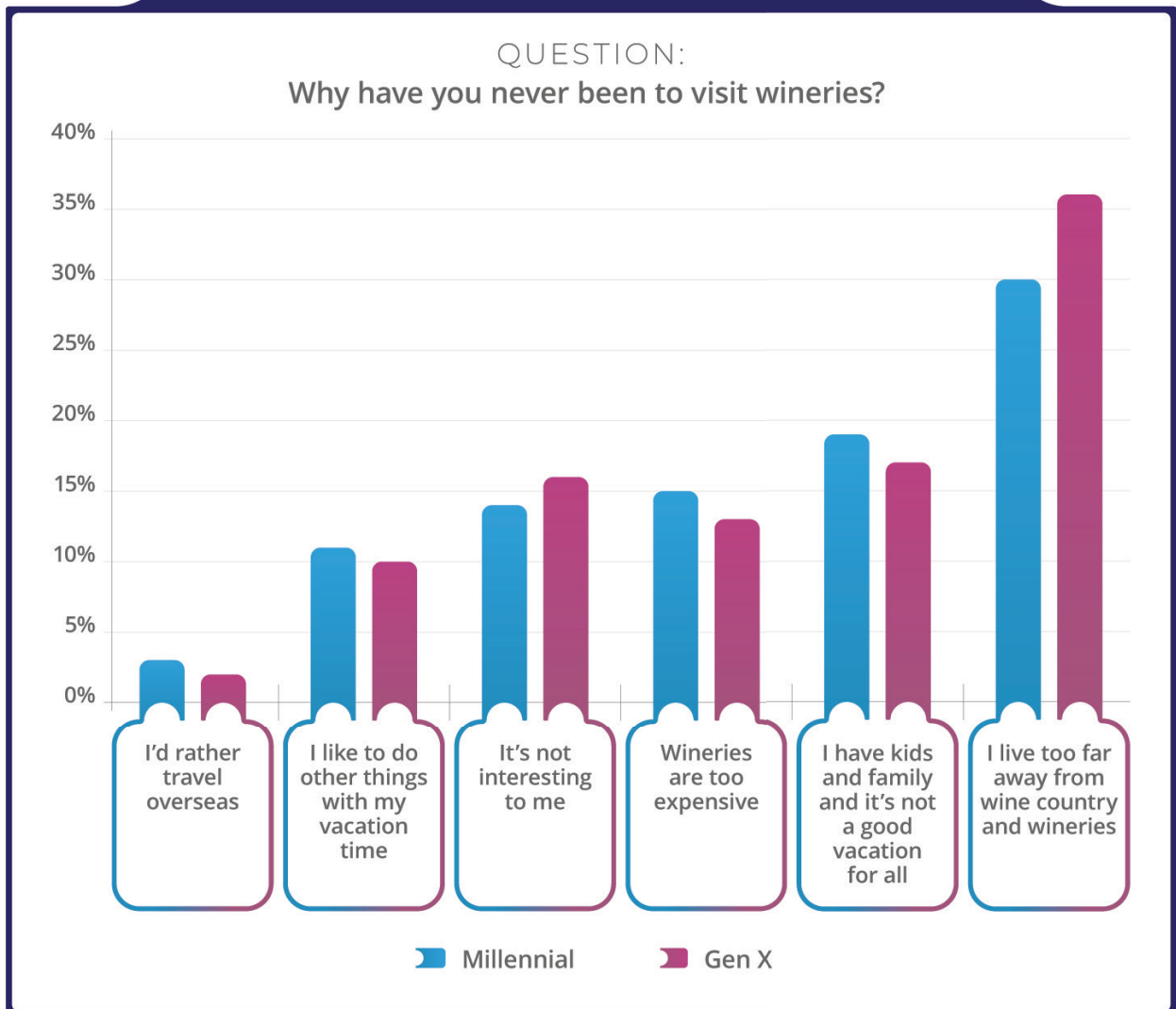


When we asked the 25% who hadn't been to a winery why not, the most common reasons centered around convenience.

It seems they don't hate wine country; They have busy lives and aren't near a wine country.



CHART 17

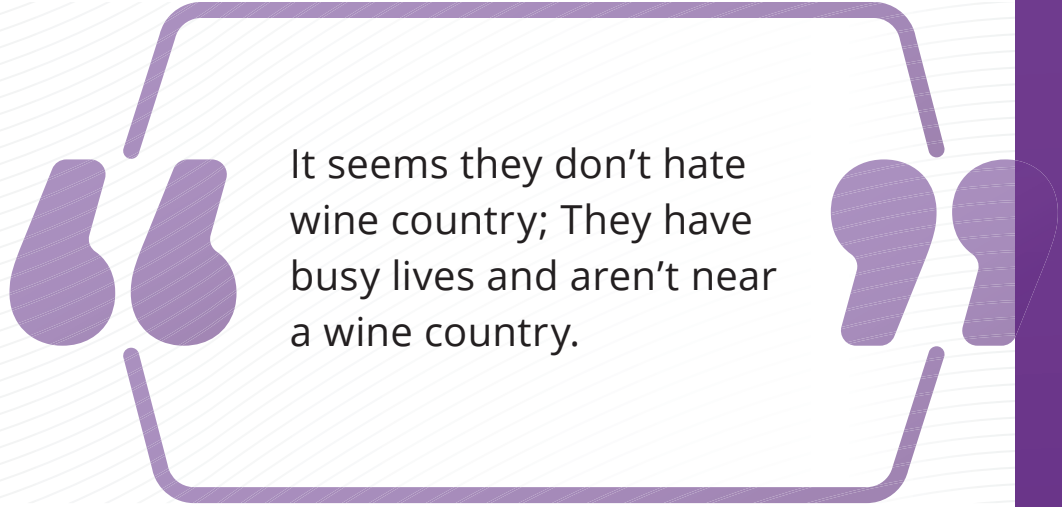


SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

The cost also comes up for Millennials.

This makes sense if we remember that millennials are in their prime family-time years, and wine country isn't exactly a family-friendly trip.

One of the hottest tourism trends for 2024 is family-friendly vacationing and opportunities for cross-generational activities. Millennials and Gen X are squeezed between caring for their kids and caring for their aging parents. They need things the entire family can enjoy.



It seems they don't hate wine country; They have busy lives and aren't near a wine country.



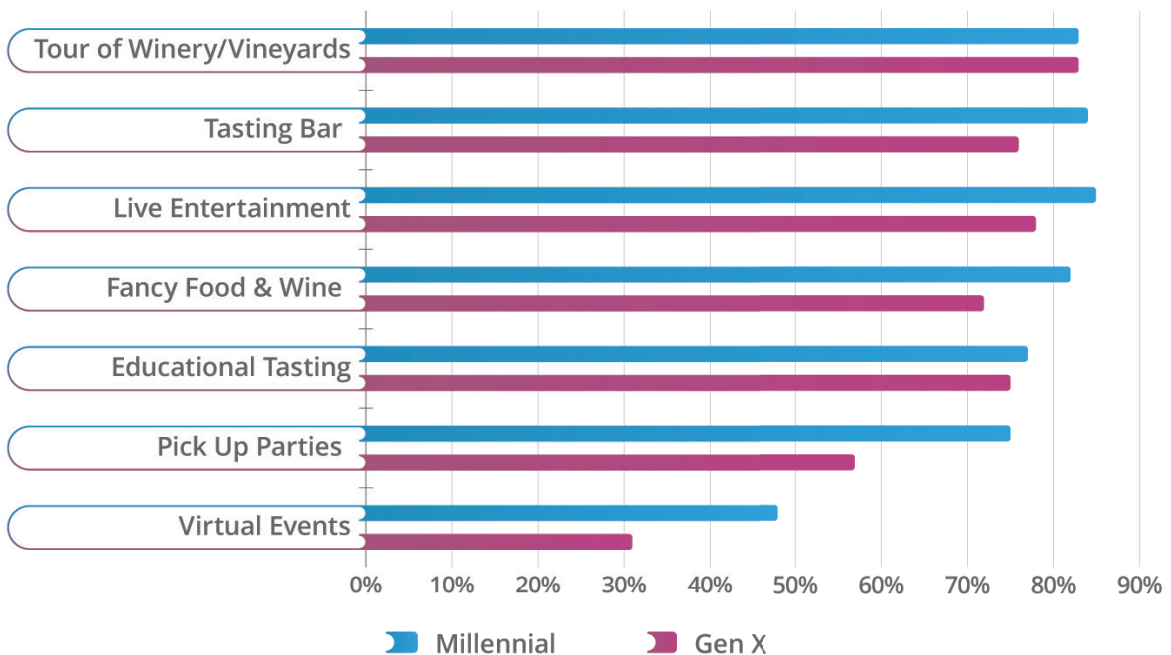
So, the takeaways are to consider going to your consumers instead of asking them to come to you, and also how can you be more generationally inclusive and offer activities for families traveling together.

When they do visit wine country, they don't want a fussy ceremony. They want to relax. They love the atmosphere and report their favorite thing is tours, but we seem to be having a renaissance for the tasting bar where you can drop in. Live music is always a draw, especially for Millennials, and there is also a time and place for more structured food, wine, and education, but don't always lead with those. Also, it seems that pick-up parties and virtual events might work for some Millennials, but most Gen X will say no to those.

CHART 18

QUESTION:

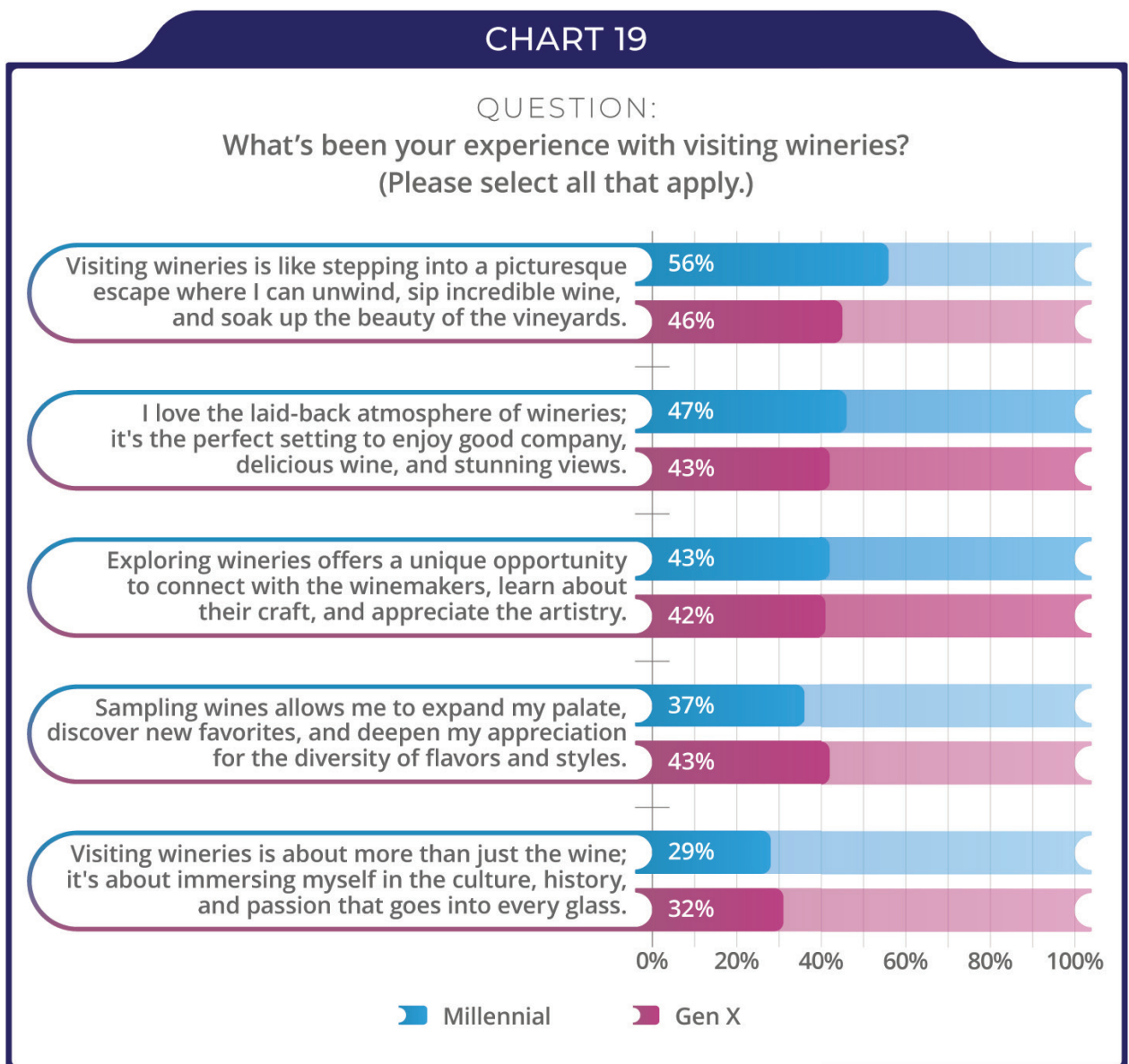
Please rate your preferences for activities you might find at a winery.
("Like a Lot" and "Love This" responses only.)



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

From here, we asked for some feelings toward wineries. We had some statements, and they could either say yes, they associate the statement with wineries, or no, they do not.

The most chosen statement, with 56% of Millennials agreeing and 46% of Gen X, is: "Visiting wineries is like stepping into a picturesque escape where I can unwind, sip incredible wine, and soak up the beauty of the vineyard."



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

The second statement, chosen just under 50% for each group was, “I love the laid-back atmosphere of wineries; it’s the perfect setting to enjoy good company, delicious wine, and stunning views.”

So, those top two statements are about chilling and relaxing in a casual setting—not the percentage of malolactic fermentation or the fundamentals of varietal sensory analysis—just being restful on vacation in the vineyards.

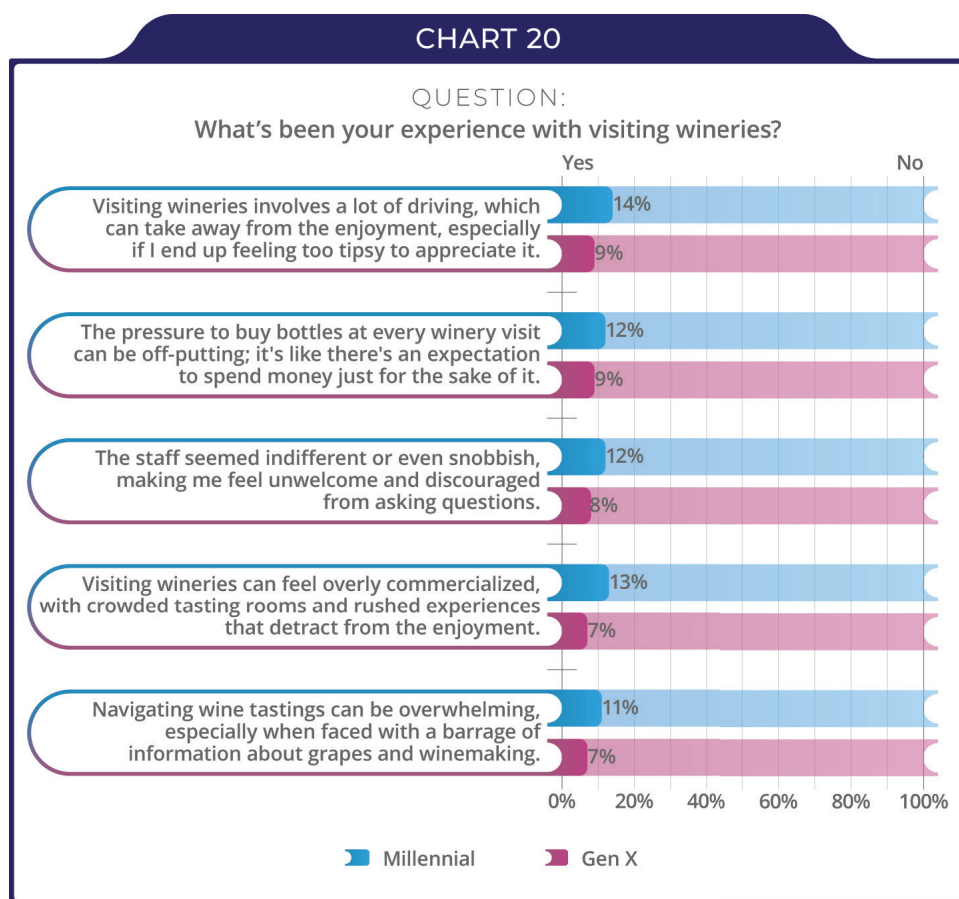
The next statements didn’t rank quite as high as the top two, and they all have a slight hint of learning something, but it’s about discovery, not mastering a skill or taking notes.



They also associated some negative statements – but not at the high percentages we saw of the positive statements. (Note that positive to negative reactions are about 4 to 1).

The most chosen negative statement is around convenience – a significant thread for this audience.

They feel that wineries are spread out, involve a lot of drinking, and have logistics that can be difficult when drinking, which all can be true.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

They also get the business model—that the tasting experience is an entry fee with an expectation of purchase. 12% of Millennials and 9% of Gen X felt pressured to buy at every stop.

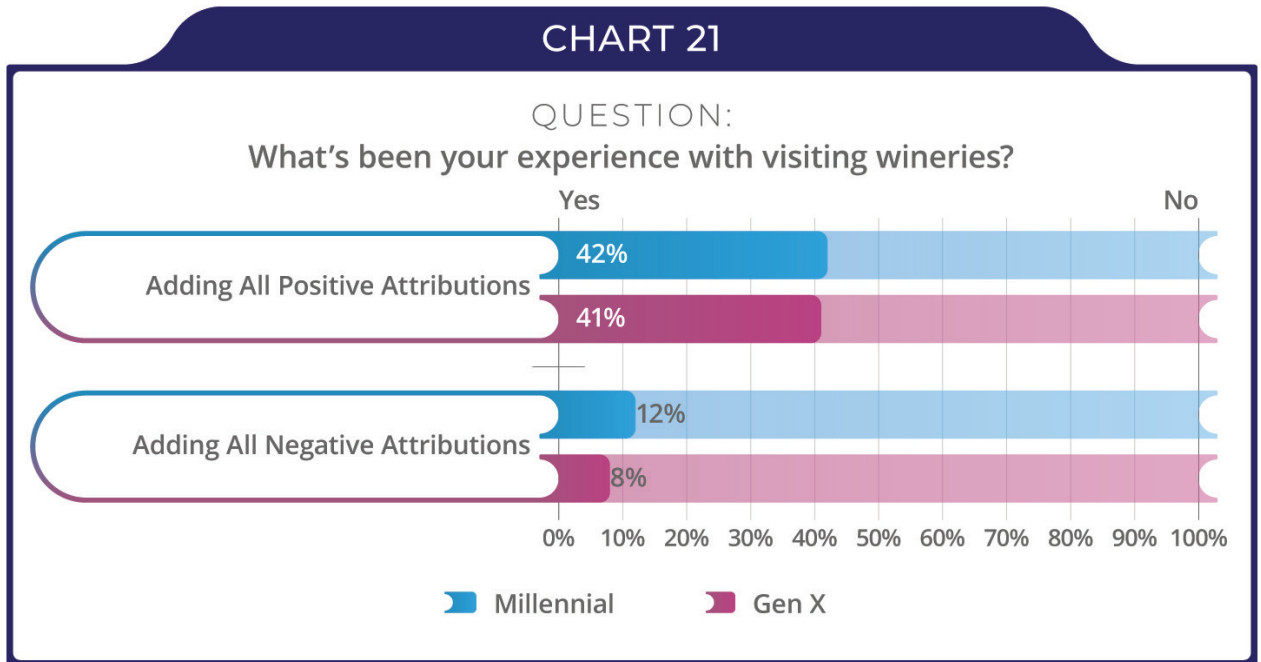
There is still the wine snob stereotype, as many believe that winery staff can feel indifferent or snobbish. Some felt wineries had become very commercialized, and some felt that wine tasting was overwhelmed by the bombardment of so much product information that it was hard to enjoy.

There are clear differences between this group and the Baby Boomers, who wanted all the information and to do the legwork. Our theory is that generations whose behavior has been shaped by the internet are used to having resources and data provided when they want it. Therefore, the skill or patience for searching for information is not appreciated, and the value of information is lower because it's easy to come by.

Where Baby Boomers valued the hunt and the process of trial and error to determine what they liked, later generations have lost interest. Millennials and Gen X make decisions much faster, and base decisions on experience and brand values over product attributes.



Overall sentiment about visiting wineries in wine country is positive – and about equally so. However, the negative feelings are more strongly felt by Millennials than Gen X.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey



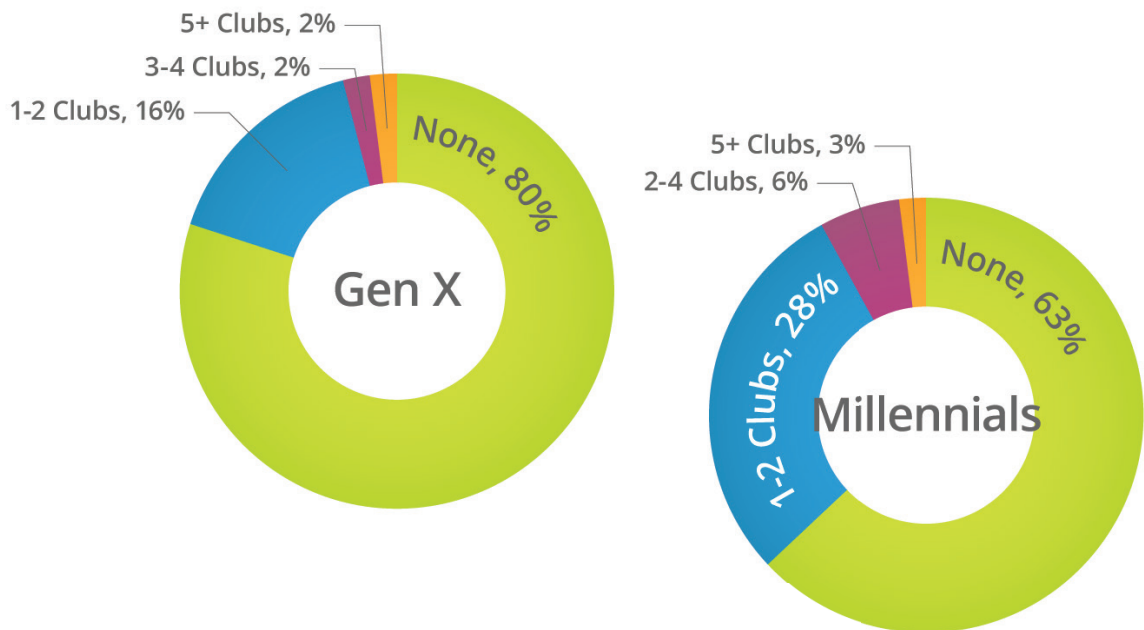
We asked about wine clubs, and surprisingly, Millennials were more likely to be in a club than Gen X. 80% of Gen X weren't in a club, and 63% of Millennials were. For both groups, if they were in clubs, they were in 1-2, although 6% of Millennials were in 3-5 clubs, and 3% were in five or more.



CHART 22

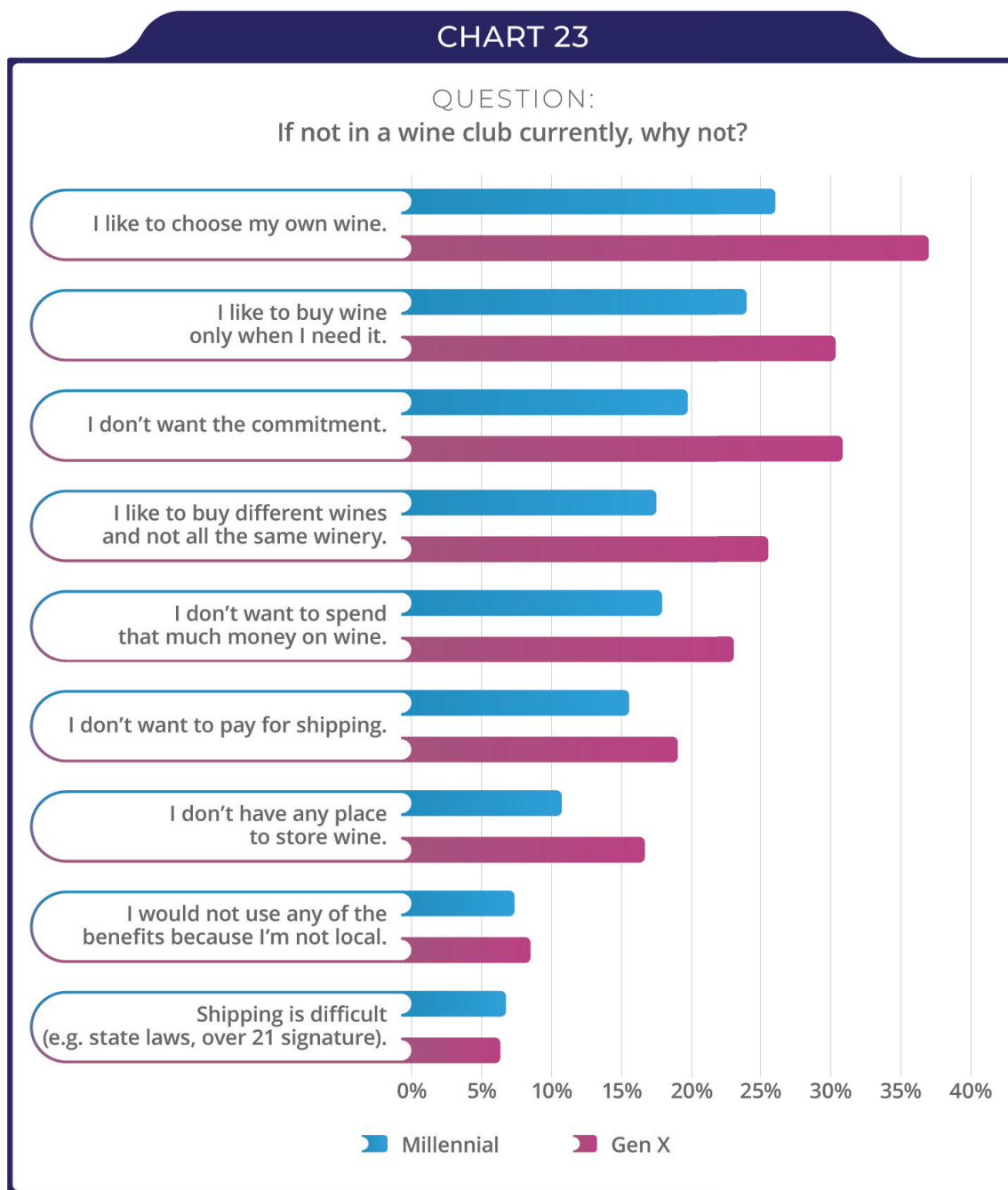
QUESTION:

Do you currently belong to any wine clubs?



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

When the ones who weren't in a wine club were asked why, it came down to variety and control. Baby Boomers approved of Wine Clubs because they are attracted by the practical nature of a discount and enjoy the confidence of vetting the winery, which reassures them that they will like the wines. However, flexibility and variety are more important to Millennials and Gen X, which is why the model isn't resonating with them.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey



Attitudes and Beliefs



Here are the top statements they agreed with – and there wasn't a significant difference between Millennials and Gen X so we combined them. For each of these statements, more than 65% of our audience agreed with the concept, and fewer than 20% disagreed.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

The top ten support an affinity for value, moderation, exploration, and authenticity.

These statements outline some very clear trends in what kind of winery they are looking for. They want a winery with straightforward values that match their own and nothing too extravagant or wasteful.

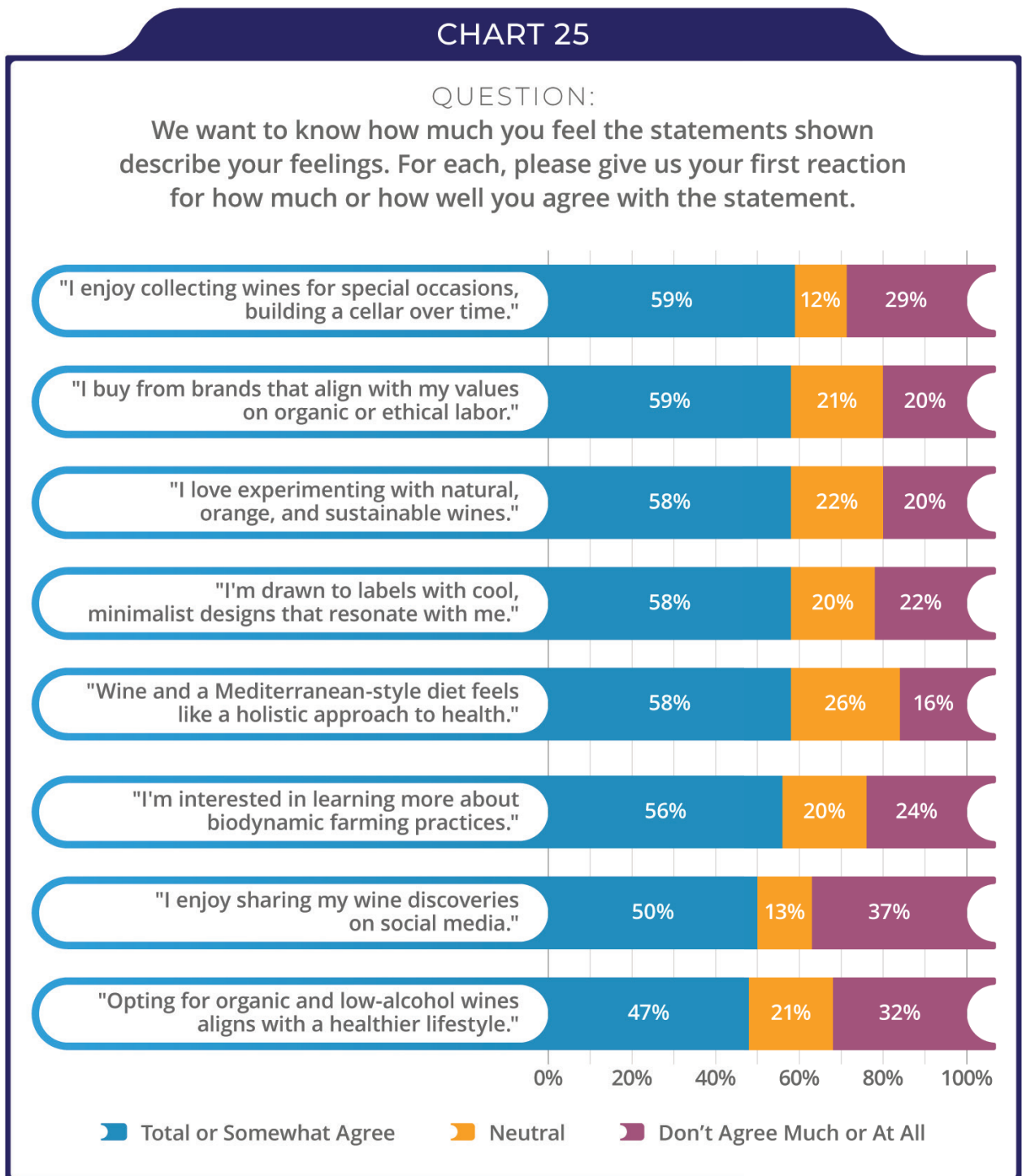
They also clearly have a joy for exploration.

Wineries that want to appeal to these consumers must take care not to go too “precious” with their attempt at luxury or risk being viewed by this group as restrictive, formal, and overly ornamental.

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Here is the bottom seven statements they didn't agree with. For each of these, less than 45% agreed, and more than 45% disagreed.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

The bottom five are somewhat thematic. As an industry, we like to paint a picture of Millennials as lost, scared, and confused about wine. Our response is to educate them.

It's not that they're overwhelmed with the details; they're just not interested in them. They are attracted to wine and wine country but want it to be relaxed and fun.

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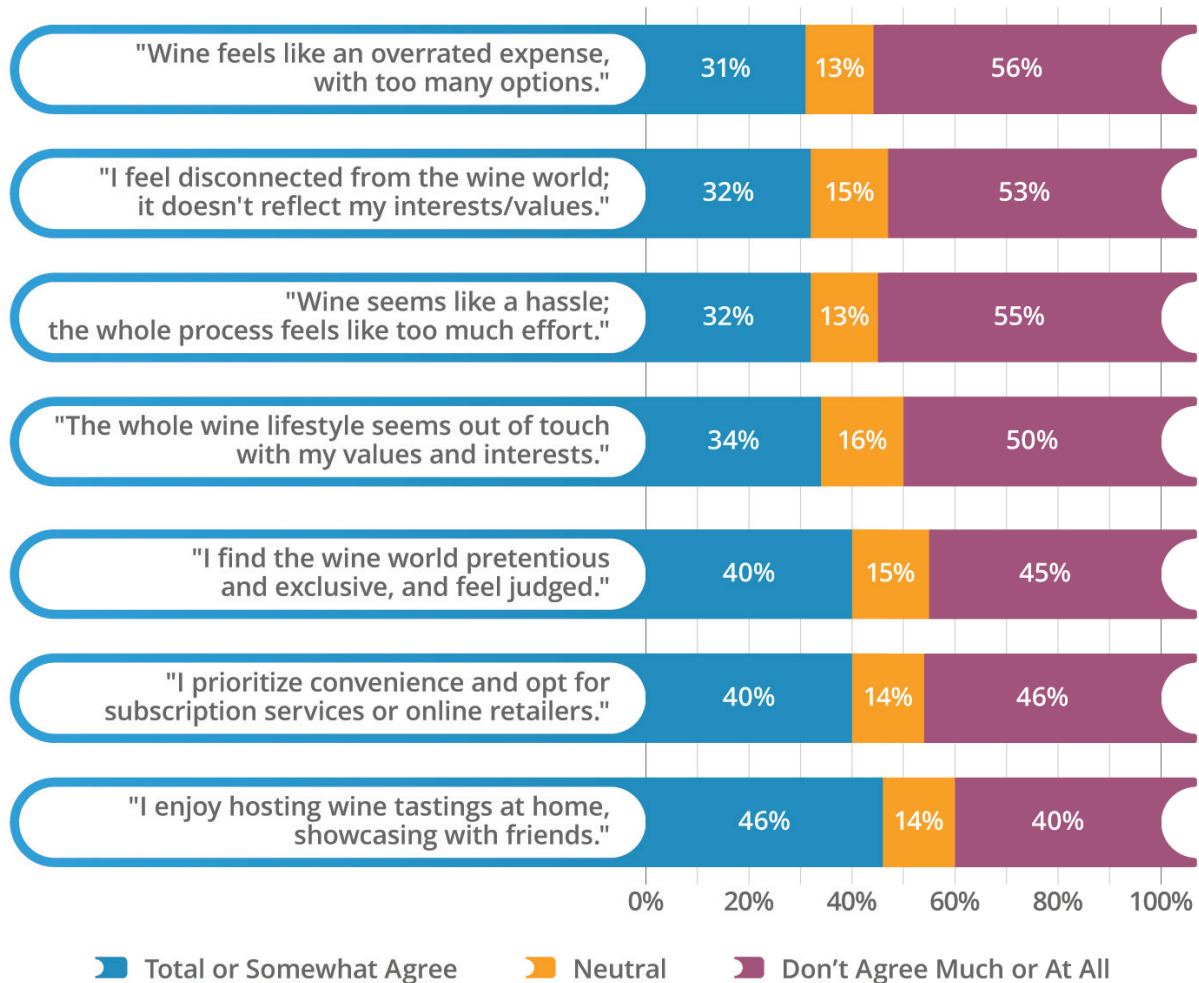


The statements in the middle had more than 47% in agreement and less than 32% disagreed. These statements were primarily about personal opinions and preferences regarding packaging, health, and social issues. Depending on your brand and target, these could be hot issues or not.

CHART 26

QUESTION:

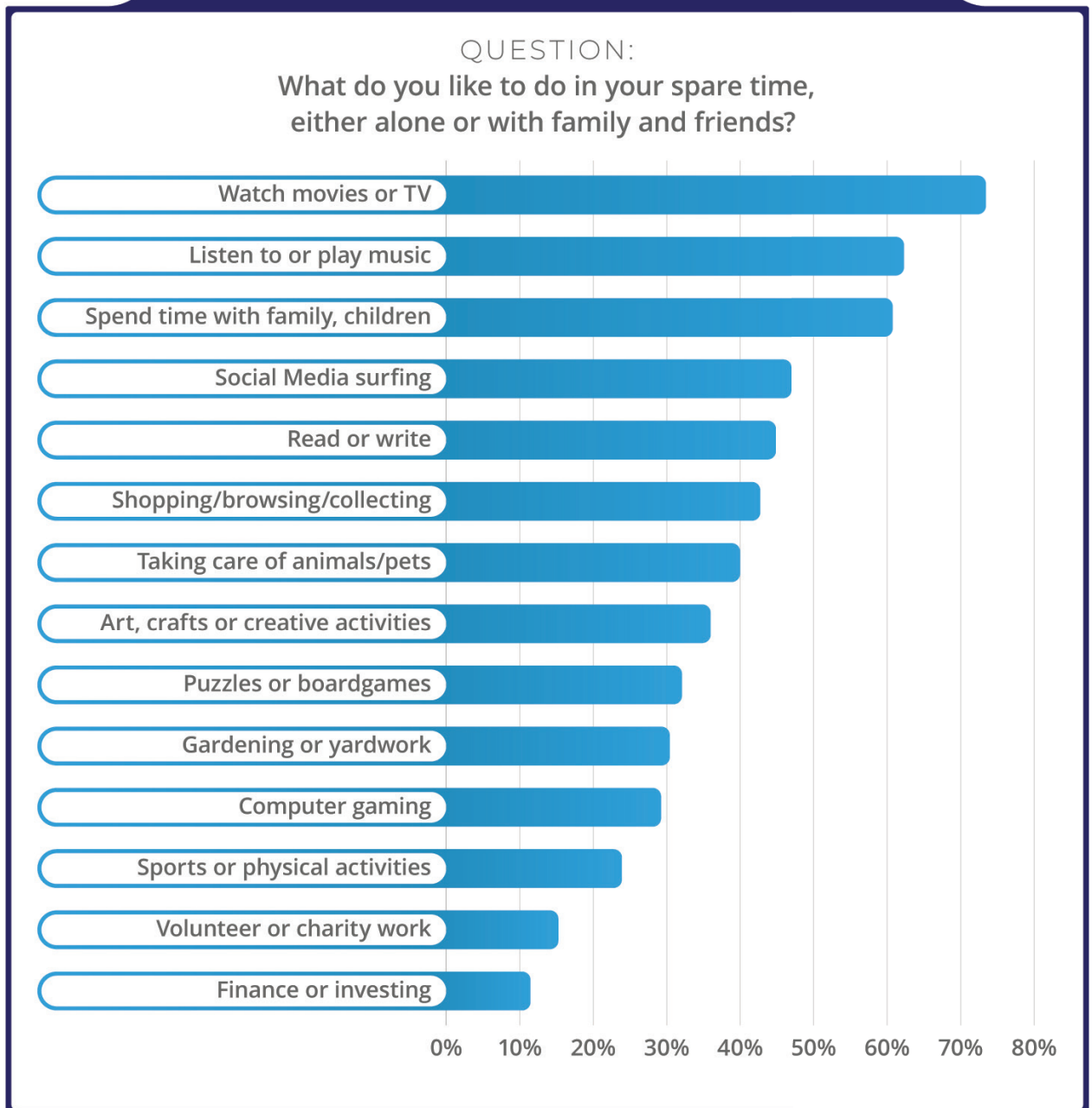
We want to know how much you feel the statements shown describe your feelings. For each, please give us your first reaction for how much or how well you agree with the statement.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

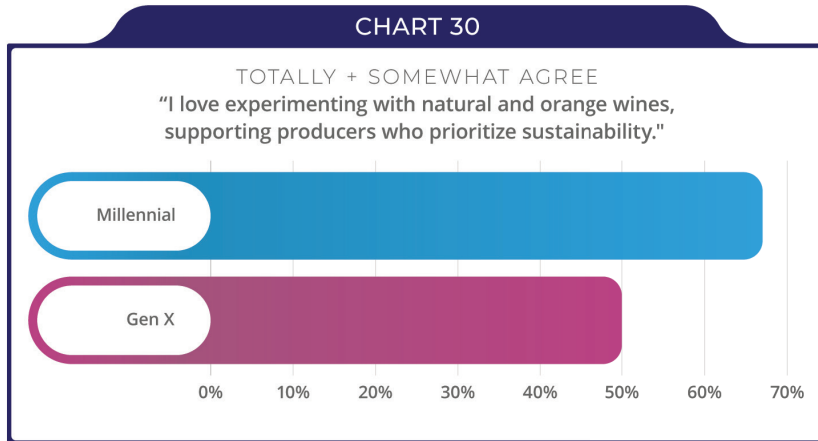
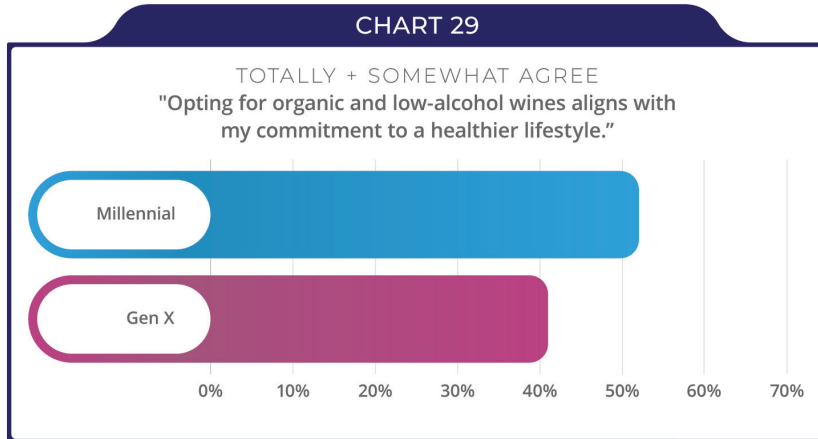
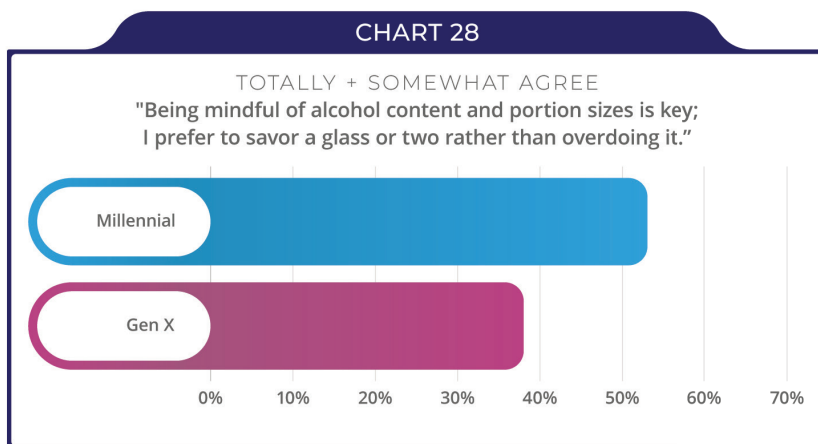
What else does this group believe in? They also have similar interests and lifestyles. Both groups rate digital entertainment from movies, TV, music, and the internet in their top five activities, rounded out by time spent with family and reading or writing. We can get an idea of how busy they are as they don't report having a lot of time for hobbies, sports or volunteer work.

CHART 27



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

This group didn't agree on everything, however. The concept that wine is a healthier and more moderate alcohol choice resonates with Millennials, but Gen X isn't entirely buying it. Millennials believed statements around health and sustainability more than the Gen X audience, which shouldn't be too surprising since cynicism is a hallmark of the Gen X belief structure.

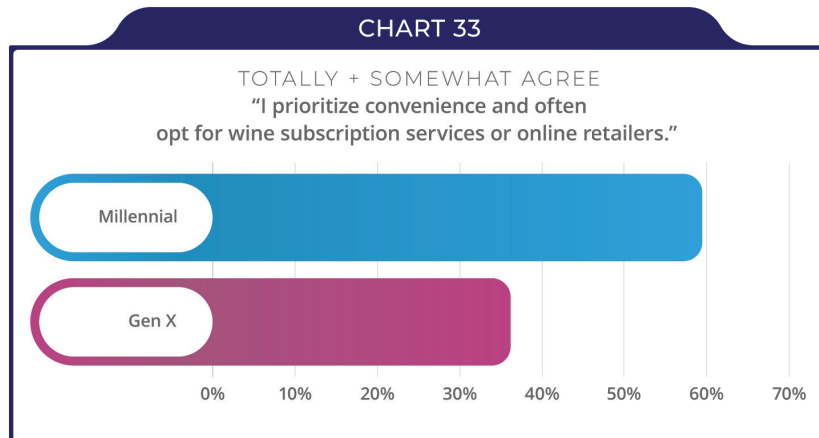
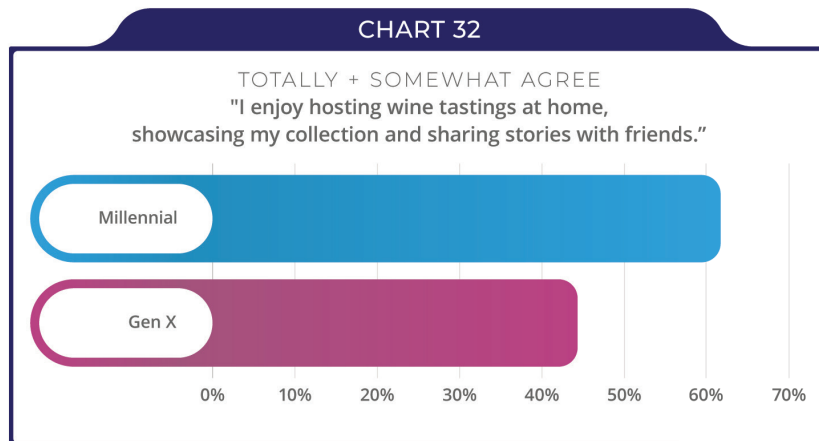
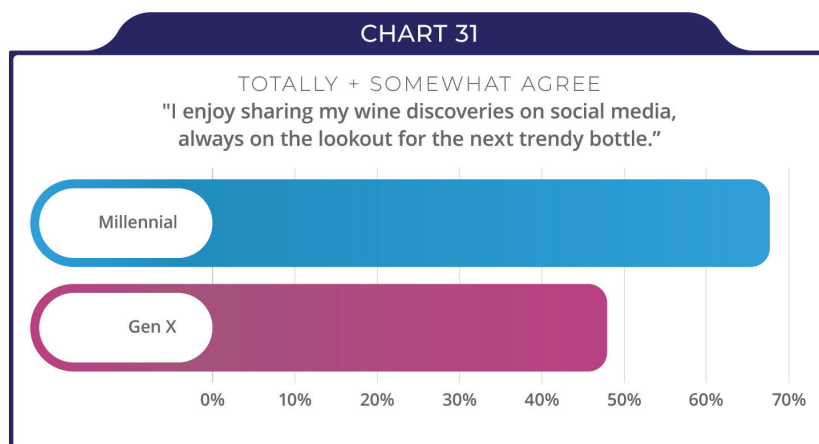


SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

Gen X is also frequently accused of being antisocial. The statements around the sharing aspect of a wine community fell flat with Gen X.

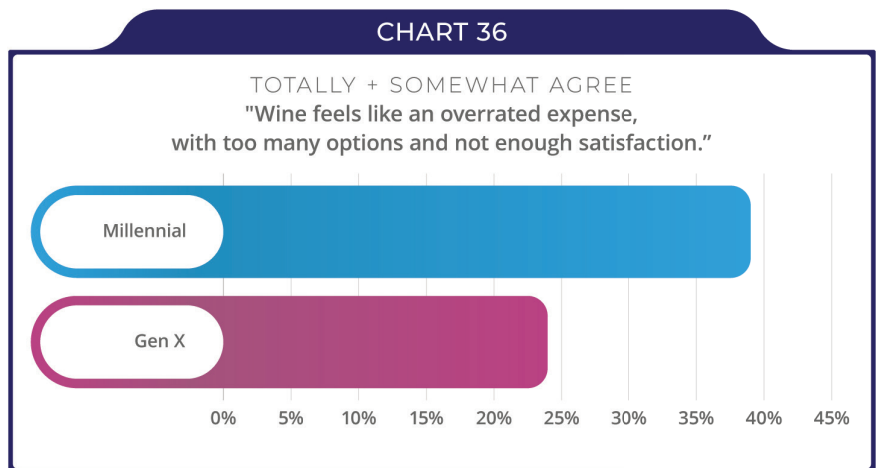
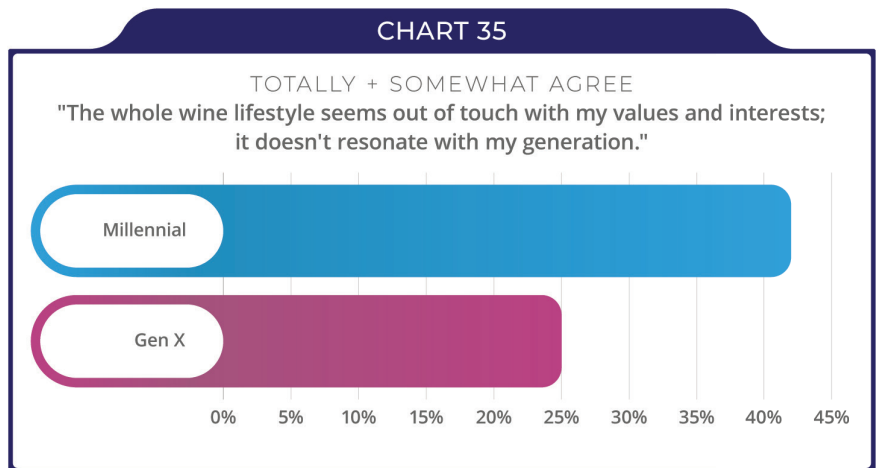
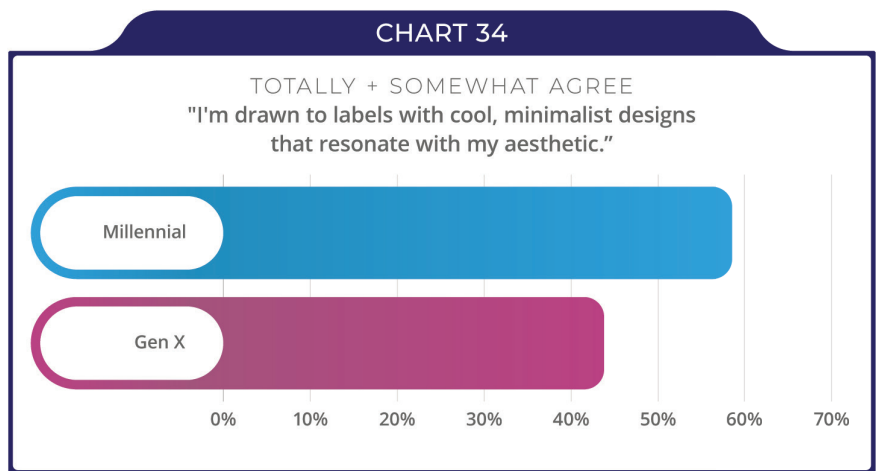
The question with the most significant delta was about online shopping convenience.

There is a consistent thread about busy lives and full agendas with Millennials. Products and brands bringing convenience and order to their lives will be valued. This mirrors the data earlier as Millennials are twice as likely to buy wine from online channels as Gen X.



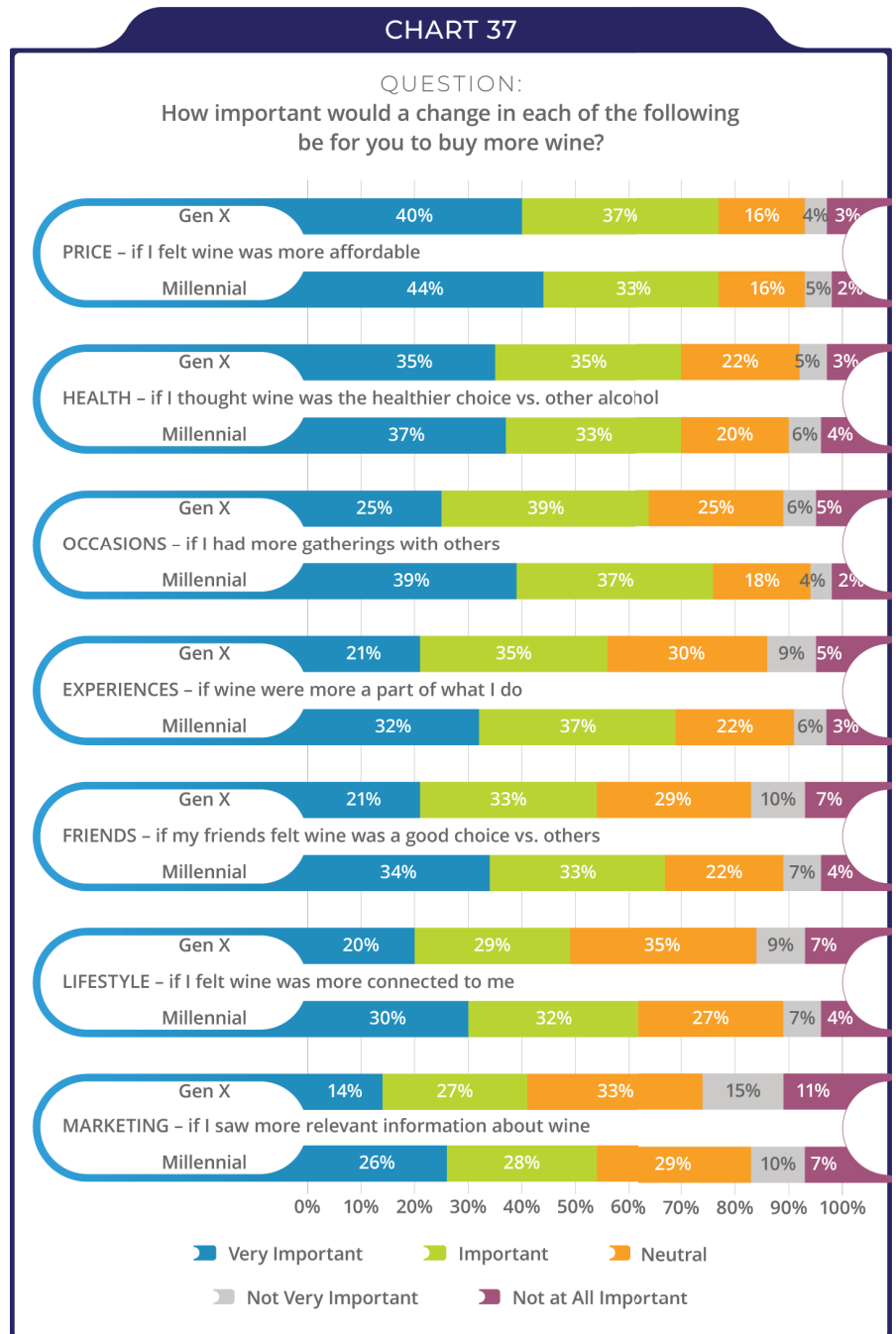
SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

While none of these three statements were in the top ten, they showed statistical differences between the two audiences. Millennials tended to agree more with the statements tied to the idea of modernity, telling us that the old ideas didn't meet their values and interests.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

We then gave them seven variables and asked them how important they were using the same five-point scale. Not surprisingly, both groups saw a fluctuation in price as the most significant. But after that, it differed.



SOURCE: 2024 WineGlass Marketing Wine Consumer Usage and Attitudes Survey

Millennials thought the occasion was next in importance and for Gen X, it was health. There are a couple that flip-flopped between the two, but the themes are similar. Price was most important, followed by health, then occasion and social influences, and finally, lifestyle and relevance.



07

Summary and Conclusions

Did this surprise you?

It surprised us in how pointed and clear the results were. We always had a hunch that Millennials made purchases based on different values, but the evidence is now clear.

First, we must stop the narrative that Gen X and Millennials don't drink wine. Not only do they drink it, but they do so frequently, do not seem to be consuming less over time, and aren't afraid to spend money on wine.

They drink wine, but they also consume other alcoholic beverages, and that isn't stealing our market share. They value choice and wine is a preference. The objective for most wineries should not be to try and get people to drink wine, but to provide choice and preference to try their wine.

These consumers do not consider wine a precious beverage to savor with ceremony. Wine is a lower-alcohol cocktail to kick back and enjoy with friends.

Although there is a high awareness of factors like alcohol and sugar levels, wine is seen as a healthier choice for a moderate lifestyle.

Gen X and Millennials will join wine clubs, but wineries should all be working on side projects to determine how to give these customers more control and flexibility.

Finally, we need to drop the preconception that consumers are overwhelmed by wine choices and waiting for us to come to educate them. They're not. They enjoy variety and don't fret over it. They'll try an orange wine not knowing (or caring) what it is. The answer is not to throw educational materials and guided wine tastings at them. It will not make them care about the wine-making process.



How should we change our approach?

Don't wait for consumers to visit you in wine country.

They are more comfortable shopping online and consider relationships with brands forged virtually as genuine and equal to those created face-to-face. Don't hinge your direct-to-consumer business success on tasting room traffic. We heard loud and clear that these consumers feel traveling to wine country is an unnecessary cost and hassle and not integral to enjoying your wine – so don't make them. This doesn't mean they don't like wine country – it's just not part of the education process that Boomers enjoyed.

Along those lines, start working harder at a relationship with your online consumers. Don't think of the non-club or online mailing list as second-class customers to your club or those who visit you on-site. The balance will soon shift, and you'll find yourself without strong customer relationships. If you've been ignoring them, it may take a while, but keep at it with regular communications, and you'll be glad you have that customer engagement in the future.



Turn your enthusiasm from education to exploration.

Though education is not as attractive to them, variety and food and flavor exploration are—therefore, position yourself as part of a social food and wine gathering.

They care about sustainability and health. So, instead of giving another barrel room tour, try a tour about your owl boxes or native plant program.

If you can expand your varietals or offer more selection, do it. And do start thinking about your wine club and how you can evolve that with more surprises.

Online basics are key.

Finally, if you don't have your act together as an online business, get it together. Tools are available for even the most modest small business to have efficient websites for ordering, fulfillment, and tracking communication. Ensure the customer experience goes all the way to the door and doesn't end at the checkout button.

Remember that your website is your online tasting room, and tens of hundreds more people will see it than your property, so let's usher in this new era of online support for these thirsty, eager consumers!



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