The 2026 Winery Digital Marketing Capabilities Report

A data-driven assessment of 491 winery websites across six U.S. wine regions

CAN WINERY WEBSITES MEASURE WHAT THEY SPEND?

OLD VINE MARKETING

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Executive Summary

Direct-to-consumer wine sales depend on a working marketing funnel — a way to bring new prospects in at the top, convert them to club members in the middle, and retain them through repeat purchases at the bottom. Over the past decade the industry has built impressive infrastructure for the middle and the bottom. The top is broken, and it is broken in a way most wineries cannot see.

This report measures whether wineries have the digital marketing capability to acquire customers measurably. It does not measure whether they actually do. The distinction matters. A winery that has installed Google Ads conversion tracking has not proven that it knows its cost per club signup; it has proven that it could know, if it chose to look. The number with the capability is small. The number that have proven they use it is smaller still.

We audited 491 winery websites across Napa Valley, Sonoma County, Willamette Valley, Paso Robles, Mendocino County, and Lodi. The sample covers wineries that sell direct-to-consumer in any form — through a public e-commerce platform, through an allocation list, or both. Twelve brands operating purely on three-tier wholesale or as corporate-umbrella sites were excluded. For each winery we recorded the e-commerce platform, Google Analytics status, tag manager configuration, Meta and Google Ads pixel presence, the email service provider authorized in DNS to send mail on the domain's behalf, and additional marketing infrastructure.

A note on framing

We score wineries on a maturity scale, not a leaderboard. The top tier in this report is called "Capable" rather than "Digital Marketing Leader." That naming is deliberate. A score in the Capable tier means the winery has the technical capability to measure paid acquisition. It does not mean the winery is using that capability well — or even at all. The next benchmark, beyond this report, is whether a winery can name its cost per acquired customer from last quarter. Most cannot, including many in the Capable tier.

The headline findings

- **92% of wineries operate a DTC commerce platform. Only 16% have Google Ads conversion tracking installed.** The industry built the cash register before it built the system to measure what feeds it.
- **55% of wineries have neither a Meta pixel nor a Google Ads conversion tag installed.** Those wineries can spend on paid media but have no way to tell whether the spend produced revenue.
- **9% are running "analytics-dark."** Their Universal Analytics tag is still on the site, but UA stopped collecting data in July 2023 — almost three years of empty dashboards.
- **Lifecycle email is far more widespread than commonly thought — and Mailchimp, not Klaviyo, is the actual industry default.** 74% of wineries authorize at least one ESP. 58% authorize

Mailchimp; 28% authorize Klaviyo. 30% authorize two or more — a sign of layered stacks or unfinished migrations.

- **71% of wineries do not enforce DMARC.** Every dollar invested in lifecycle email is at risk if the messages land in the spam folder. Most of the industry has built the email program without protecting the deliverability.
- **42% of wineries fall in the Beginner tier; 28% reach Capable.** The gap between these tiers is not budget. 66% of Capable wineries are mid-sized, small, or family-owned, not Large producers.
- **Capability does not equal usage.** The Capable tier has the infrastructure to measure: 100% have GTM, 99% have a Meta pixel, 53% have Google Ads conversion tracking. Whether they actually read the data is a separate question this report does not answer. The Beginner tier has 3% GTM, 7% Meta pixel, and 0% Google Ads conversion tracking — actual zero out of 208 wineries. They cannot use what they do not have.

What this report gives you

A benchmark for where your winery sits today in terms of digital marketing capability, a clear picture of where the industry is most exposed, and a 90-day plan to install the measurement and acquisition stack that the top tier already has running. The bulk of this work is not expensive. None of it requires a website rebuild. What it requires is the decision to start measuring — and, once measurement is in place, the discipline to read what the numbers say.

Why Top-of-Funnel Matters Now

Most wineries built their DTC programs in an era when foot traffic was abundant and email lists grew on their own. A tasting room visit became a club signup, a club signup became a relationship, and the marketing job was mostly to keep emailing the people who had already raised their hand. That model worked for twenty-five years. It is finished now, and the data in this audit explains why so few wineries are ready for what comes next.

Two things have changed at once. Visitor traffic to wine country has softened in most regions, which means fewer new names entering the funnel through the tasting room. And the existing email lists most wineries built during the boom years are now saturated — the same prospects, the same offers, with progressively lower response rates. When response softens, the only remaining knob most wineries can turn is discount depth. Discount-driven email trains the list to wait for the next sale, which kills margin and accelerates the cycle.

The way out is acquisition. New names. New visits. A measurable, paid path to growth that does not depend on the existing list. The wineries growing DTC revenue in 2026 are the wineries that decided twelve to twenty-four months ago that they would build a paid-acquisition program. Almost none of them are doing anything exotic. They installed the basics, gave the data time to accumulate, and started making decisions on numbers instead of vibes.

Every car that drives up the driveway costs somebody something

When I ran direct-to-consumer marketing at my last gig, my fully-measured cost to put a stranger in the driveway sat between $50 and $100 per visitor. That number came from running Google Ads, Meta ads, website visitor identification for prospecting, Modern Postcard for direct mail, paid placements on NapaValley.com and others, a highly optimized website, and the occasional print ad. The reason I knew the number is that every channel had measurement attached to it. I could see what each one cost and what it produced, and I could shift dollars from the placements that were not earning their keep to the ones that were.

Most wineries cannot name that number. They have an “advertising budget” — sometimes a substantial one — and they spend it on hunches. A magazine ad here because the publisher called. A directory listing there because the regional association recommended it. Some social posts. Maybe a Google Ads campaign run by an agency with no conversion tracking installed. The dollars go out. The visitors arrive. Nobody can tie the two together.

And the $50–$100 number was just the acquisition floor — the spend on measurable channels to get someone to the driveway. It does not include tasting room staff time, marketing materials, or the cost of running the tasting room itself. Fold those in and the fully-loaded cost per acquired customer is meaningfully higher. The exact number is hard to compute because wages vary by region, because tasting room staff serve both new visitors and returning club members from the same labor pool, and because a couple tasting together might be one buying unit or two depending on how you count. Those are real complications. They are also the reason almost no winery in this dataset can tell you what an acquired customer actually costs them.

The tasting room is not the acquisition channel most owners think it is

Most winery operators describe the tasting room as their primary acquisition engine. "We get them in the door, pour them some wine, sign them up to the club." The mental model treats every tasting room visit as a potential conversion event, and the labor required to serve those visits as money well spent on building the customer base.

The reality at most established wineries is the opposite. The majority of tasting room traffic is people who are already customers — club members picking up allocations, members bringing guests, comp visits, release party attendance, returning buyers stopping in on their next trip. The first-time prospect with no prior connection to the winery is the minority of visitors at most working DTC operations. The tasting room is, in aggregate, a retention channel that happens to do some acquisition on the side, not the other way around.

This misreading has real consequences on the P&L. When an owner sees substantial tasting room labor spend and concludes "we already invest heavily in acquisition," they are attributing retention work to the wrong column. Most of that labor is funding the experience for customers the winery already has. The acquisition slice — the staff time genuinely spent converting strangers into customers — is a fraction of the total. The labeled marketing spend is also small. Add the two together properly and acquisition spending at most wineries is much lower than the owner believes.

Allocating tasting room labor between acquisition and retention is hard. It requires tracking what kind of visitor each staff hour served, which almost no winery does. But the absence of the data is not evidence that the underlying split is favorable. It is evidence that owners are making capital allocation decisions about their largest variable cost without knowing how that cost actually breaks down.

On the skepticism that paid channels do not work for wineries

Two pieces of conventional wisdom show up in nearly every winery marketing conversation, and both deserve a direct response.

“Meta ads do not work for wineries.” They might not, but very few of the wineries who say this can prove it. Of the 491 wineries audited, 274 (56%) do not have a Meta pixel installed at all: no retargeting audience, no lookalike audience, no way to evaluate whether a campaign produced revenue. “Meta does not work” in this context usually means “we ran a campaign once without measurement.” That is not a verdict on Meta; it is a verdict on running campaigns without infrastructure. I learned what worked and what didn't through years of testing. None of that was possible without accurate attribution measurement.

"Google Ads no longer matter because of AI search." AI search is real and growing, and a separate Old Vine Marketing report on Generative Engine Optimization argues that wineries should prepare for it. But AI search currently represents a single-digit share of total search traffic and a much smaller share of commercial-intent search. Google Ads is also more than search ads — it runs YouTube, the Display network, and Customer Match audiences built from your existing customer list. The conversion tag is the cleanest revenue-attribution signal a winery can install, regardless of which Google surface drives the click.

Both pieces of skepticism collapse the moment a winery installs measurement. That is the entire argument of this report.

You cannot scale acquisition you cannot measure. Measurement is not the boring prerequisite. It is the strategy.

The Headline Numbers

How we scored each site

Each of the 491 winery websites was inspected for the presence of a set of digital marketing signals visible in the public HTML, in the site's Google Tag Manager container, in the network requests issued by the homepage, and — for email service providers — in the domain's public DNS records. Signals include the e-commerce platform in use, the version of Google Analytics installed, whether a tag manager is configured, whether Meta and Google Ads pixels are firing, which email service providers are authorized to send mail on behalf of the domain, what additional marketing automation tools are present, whether a consent management platform is deployed, and what reservation, chat, or SMS infrastructure is in place.

Sites are scored on a 0–100 transparent rubric weighted toward measurement and paid-acquisition readiness. Full rubric details are in the methodology appendix. Three maturity tiers result:

36.7

Industry average digital marketing score

Across 491 wineries, six regions

Tier distribution

We group scores into three maturity tiers rather than rank wineries head-to-head. The names describe what kind of digital marketing program a site can support today, not whether the winery is good at selling wine.

Tier	Score Range	Count	% of Industry	What capability it indicates
Capable	60 – 100	138	28.1%	Built to measure paid acquisition
Intermediate	30 – 59	145	29.5%	Some infrastructure, key gaps
Beginner	0 – 29	208	42.4%	Cannot yet measure paid acquisition

The headline takeaway: 42% of winery websites are in the Beginner tier — unable to measure what their digital marketing dollars produce. 28% reach Capable, meaning they have the capability to measure, though not necessarily proof they use it. The middle 30% are in the Intermediate tier, often only one or two signals away from competence.

Where the infrastructure exists vs. what it can actually do

This is the single most important data point in the report. The winery industry has invested in commerce, reservations, and customer-relationship tooling. It has not invested in the measurement layer that lets paid marketing work alongside those investments. The gap between what is configured and what can be measured is structural, not random.

The infrastructure most wineries have	% with it	The capability that uses it	% with it	The gap
DTC e-commerce platform	92%	Google Ads conversion tracking	16%	76 pts
Authorized email service provider	74%	DMARC enforcement (quarantine/reject)	29%	45 pts
Tasting reservation system	64%	Google Ads conversion tracking	16%	48 pts
Google Tag Manager	54%	Meta pixel firing through it	44%	10 pts
Google Analytics installed	80%	Active GA4 (not analytics-dark)	71%	9 pts

Having a commerce platform does not mean measuring what feeds it. Having a reservations system does not mean knowing which channel drove the booking. Having a tag manager does not mean firing the pixels that matter. The boxes are checked. The work inside the boxes is the work most wineries skipped.

Regional Rankings

The regional picture shows clear separation. Sonoma County leads on every measurement signal we tested. Mendocino is the most exposed. Napa Valley sits at the industry average on most signals and below the leader on most others — a pattern that should worry a region of its commercial visibility.

Region	N	Avg Score	Meta pixel	Google Ads	Capable	Beginner
Sonoma County	107	47.8	64%	24%	39%	25%
Napa Valley	139	43.0	44%	21%	34%	31%
Willamette Valley	105	33.6	44%	11%	28%	49%
Paso Robles	70	26.1	30%	13%	17%	59%
Lodi	27	23.1	30%	0%	7%	63%
Mendocino County	40	19.1	25%	2%	10%	72%

Twelve wineries operating purely on three-tier wholesale or as corporate-umbrella branding sites were excluded from the analysis. The methodology appendix explains the rationale.

Reading the regions

Sonoma County leads the industry on every measurement signal. 64% of Sonoma wineries have a Meta pixel firing; 39% reach the Capable tier. Sonoma is the only region where a majority of wineries have a measurable acquisition stack — even if Google Ads conversion tracking still lags at 24%. Whatever Sonoma is doing on the marketing-ops side, the rest of the industry should be copying.

Napa Valley comes in second on average score (43.0). Napa's 21% Google Ads conversion tracking rate is the second-highest in the dataset, but for a region of Napa's commercial visibility, sitting close to the industry average on most measurement signals is a missed position. The cult-winery aesthetic — a single hero photograph, an allocation waitlist, a few sentences of copy — signals exclusivity to a collector but signals “no measurement layer” to anyone scoring the stack.

Willamette Valley matches Napa on Meta pixel (44%) but falls off sharply on Google Ads tracking (11%). The region has built a respectable retargeting stack without the search-attribution layer to match it. Closing the Google Ads gap is the highest-impact single move available to a Willamette winery this quarter.

Paso Robles shows a wide gap between commerce sophistication and measurement sophistication. 30% of Paso wineries have a Meta pixel; only 13% have Google Ads conversion tracking; 17% reach the

Capable tier. The region has commercial scale, distribution muscle, and a well-known brand portfolio — and a measurement stack that does not match.

Lodi is the second-most-exposed region. Only 7% reach Capable and 63% sit in Beginner. Not a single Lodi winery — zero out of 27 — has Google Ads conversion tracking installed. The Meta pixel rate of 30% is middle-of-the-pack, but without conversion tracking the pixel cannot drive measurable acquisition. Lodi's DTC opportunity is large and the digital-marketing runway is wide open: room for a regional leader to emerge by installing what nobody else in the region has.

Mendocino County is the most exposed region in the study by every measure we tested. 72% of Mendocino wineries are in the Beginner tier; only 2% have Google Ads conversion tracking; only 25% have a Meta pixel. For a region that sells a rugged, authentic, small-producer story, the measurement gap means most of that story is going to market without any way to be amplified by paid acquisition.

The Retention-Acquisition Inversion

Read the numbers in this report a second time, side by side. The asymmetry is the actual story.

Retention infrastructure (lifetime value)	% of industry	Acquisition infrastructure (top of funnel)	% of industry
Authorized email service provider	74%	Meta pixel installed	44%
Direct-to-consumer commerce platform	92%	Google Tag Manager configured	54%
Reservation system installed	64%	Google Ads conversion tracking	16%
Live chat or SMS infrastructure	44%	Consent management platform	19%

The winery industry has built a sophisticated machine for converting tasting room walk-ins into wine club members and for emailing those members to a third purchase. It has not built the machine that brings new prospects to the tasting room — or to the site — in the first place.

This is structurally fine in an era of abundant foot traffic. It is brutal in an era of softer foot traffic, where new demand has to come from outside the existing universe of customers. Without a measured acquisition channel, the only growth knob a winery can turn is harder use of the existing list. That list fatigues, response rates drop, and the next available knob is discount depth. Discount training kills margin and accelerates the next round of fatigue.

The fix is unsexy. Install measurement. Build audiences. Run small tests. Look at the data. Scale what works. That is the entire playbook for getting off the email treadmill.

What the Capable Tier Does Differently

138 wineries (28%) reached the Capable tier. They span every region in the dataset and include large luxury brands, mid-sized estates, and small family producers. They share a set of measurable habits, and the cliff between them and the rest of the industry is steep.

Signal	Capable (n=138)	Intermediate (n=145)	Beginner (n=208)
Google Tag Manager installed	100%	83%	3%
Meta pixel firing	99%	46%	7%
Google Ads conversion tracking	53%	3%	0%
GA4 active (not analytics-dark)	100%	94%	36%
Consent management platform	46%	14%	4%

They have the capability to measure. The Capable tier installs the tag manager, fires the pixels through it, and runs Google Ads conversion tracking at fifty-three percent. The Beginner tier installs none of these things, and zero — not a rounded zero, an actual zero out of 208 wineries — has Google Ads conversion tracking running.

Three patterns worth copying

1. They installed the foundations. Every winery in the Capable tier has Google Tag Manager configured. Three percent of the Beginner tier does. GTM is the chassis everything else attaches to, and the Capable tier built it first.

2. They route everything through one container. 99% of the Capable tier has a Meta pixel firing, and 100% has GTM. The pixel fires through the tag manager rather than being hard-coded — which lets the marketing team add, modify, and audit tags without engineering work.

3. They have the capability to measure paid acquisition. Half of the Capable tier (53%) has Google Ads conversion tracking installed — a real conversion event tied to revenue, not a pageview. Four percent of the Intermediate tier has it. Zero of the Beginner tier does. This single tag is the sharpest dividing line in the dataset between wineries that can know their cost per acquired customer and wineries that cannot.

Why this isn't about budget

Among the 138 Capable wineries, 91 (66%) are mid-sized, small, or family-owned — not Large brands. This matches the GEO Readiness Report finding: the digital marketing programs that work in 2026 are run by wineries that decided 18 to 24 months ago that this was a board-level priority.

The Email Service Provider Picture

Email is the most cost-effective lifecycle channel in wine DTC. It is also the channel where conventional wisdom is most often wrong. The data in this report comes from DNS — specifically, the email service providers that each winery's domain has authorized to send mail on its behalf. DNS is the only reliable way to identify an ESP: site-only detection over-counts Klaviyo (its widget fires from the page) and misses Mailchimp, Salesforce Marketing Cloud, and most platform-based senders entirely (they operate on the backend, where a website crawler cannot see them).

Of the 491 DTC wineries audited, 365 (74%) authorize at least one email service provider in DNS.

Mailchimp is the actual industry default

58% of all DTC wineries authorize Mailchimp. 28% authorize Klaviyo. If your assumption about the industry was "Klaviyo is dominant in wine," the data does not support it. Klaviyo has visible market share — particularly at the premium end of Napa, where 41% of wineries authorize it — but at the industry level Mailchimp serves roughly twice as many wineries.

This matters because Klaviyo and Mailchimp are different tools serving different programs. Klaviyo is built for e-commerce-driven segmentation, behavioral flows, and aggressive lifecycle automation. Mailchimp is built for general-purpose newsletters and broadcast campaigns. A winery on Mailchimp is much more likely to be running a list-based program — periodic newsletters, release announcements, holiday campaigns — than a segmented, behavior-driven program built around purchase history and visit recency. Both can be effective. They produce different kinds of customer relationships.

ESP authorization by region

Region	N	Any ESP	Mailchimp	Klaviyo	Multi-ESP
Napa Valley	139	79%	60%	41%	36%
Sonoma County	107	80%	61%	34%	30%
Willamette Valley	105	79%	71%	23%	23%
Paso Robles	70	67%	56%	21%	14%

Region	N	Any ESP	Mailchimp	Klaviyo	Multi-ESP
Lodi	27	63%	56%	19%	15%
Mendocino County	40	48%	32%	12%	8%

Three observations from the regional picture. First, ESP adoption itself is much more uniform across regions than the rest of the marketing stack. Even Mendocino, which trails on every other measurement signal, has a 48% ESP authorization rate. Lifecycle email is the one piece of digital marketing that almost every region has at least partially built. Second, Klaviyo concentration tracks closely with brand premium: 41% in Napa, 34% in Sonoma, falling to 12% in Mendocino. Klaviyo's price point and segmentation features are a better fit for the higher-AOV cult and luxury segments. Third, multi-ESP adoption — wineries authorizing two or more sending platforms — is meaningfully higher in Napa (36%) and Sonoma (30%) than elsewhere. This is either layered sophistication (Mailchimp for newsletters, Commerce7 for transactional) or unfinished migrations leaving stale DNS records. The data cannot distinguish the two cases, but in our consulting experience the latter is at least as common as the former.

DMARC enforcement: the 71% that puts every email program at risk

Every winery investing in email lifecycle is implicitly assuming the messages reach the inbox. That assumption gets shakier every year. Gmail and Yahoo both began rejecting unauthenticated bulk senders in 2024, and the enforcement is tightening industry-wide. DMARC — Domain-based Message Authentication, Reporting, and Conformance — is the DNS record that tells receiving servers what to do with messages that fail authentication. “p=none” means monitor only and deliver anyway. “p=quarantine” means send suspicious mail to spam. “p=reject” means block it outright. The latter two are enforcement; the first is not.

29% of wineries enforce DMARC. 71% do not. 57% have a DMARC record set to p=none, which provides reporting but no protection. 15% have no DMARC record at all. The wineries that have built the most sophisticated email programs — segmented, automated, expensive — are running them on infrastructure that does not protect against domain spoofing or guarantee inbox placement. The 71% that do not enforce DMARC are, in deliverability terms, one bad actor's spam campaign away from their legitimate marketing email landing in everyone's spam folder.

Fixing this is not glamorous and it is not expensive. SPF, DKIM, and DMARC records are configured at the DNS layer. Most ESPs publish detailed guides for their customers. The work takes a half-day for someone who has done it before and a day for someone who hasn't. The protection compounds across every email investment a winery has already made.

The Five Gaps You Can Close This Quarter

The data points to five specific gaps where the industry is most exposed. They are ordered by impact-to-effort — the fastest wins first. None require a website rebuild and none require a new agency relationship.

Gap 1: Confirm GA4 is actually running

9% of wineries are analytics-dark — their old Universal Analytics tag is still on the site, but Google shut UA down in July 2023. They have not received analytics data for almost three years. Open analytics.google.com and look at the property name. If it begins with "UA-" you are dark. If it begins with "G-" you have GA4. A 20-minute fix from any half-competent developer.

Effort: one afternoon. **Impact:** recovers a foundational data stream that every other recommendation in this report depends on.

Gap 2: Install a Meta pixel and fire it through GTM

56% of wineries do not have a Meta pixel installed. Without it there is no retargeting audience, no lookalike audience seeded from purchasers, and no way to evaluate whether a Meta campaign produced revenue. The pixel takes 30 minutes to deploy through Google Tag Manager. Once it is firing, it begins building your audiences in the background — even before you run a campaign.

Effort: half a day with your developer. **Impact:** every future Meta campaign starts with measurable conversion data and a warm audience.

Gap 3: Install Google Ads conversion tracking

84% of wineries cannot tie a paid Google click to a revenue event. This is the single highest-leverage installation on the list. The conversion tag fires on order confirmation, club signup, or any other event the winery defines as valuable. Once it is running, every dollar of Google Ads spend can be evaluated on cost-per-conversion and return-on-ad-spend. The tag installs in an afternoon.

Effort: one afternoon. **Impact:** turns Google Ads from an opaque expense into a measurable channel — and ends the "we don't know if it works" conversation permanently.

Gap 4: Connect your ESP to Meta Custom Audiences

74% of wineries authorize at least one email service provider. Far fewer push their email segments into Meta as Custom Audiences. The integration is available in Klaviyo, Mailchimp, HubSpot, and most major ESPs, and it pushes your active club members, lapsed buyers, and allocation waitlist into Meta automatically — keeping them refreshed as the segments evolve. Lookalike audiences built off these segments are the most effective prospecting audiences a winery can deploy on Meta. The connection takes ten minutes to configure inside your ESP.

Effort: ten minutes plus an ESP administrator. **Impact:** your existing customer data becomes the seed for paid acquisition audiences that actually look like your buyers.

Gap 5: Deploy a consent management platform

Only 19% of wineries have a consent management platform configured. As cookie-consent enforcement tightens, a CMP is increasingly the prerequisite for legally compliant pixel firing. Beyond compliance, a properly configured CMP improves data quality by making consent state explicit to every downstream tag. Cookiebot, OneTrust, and Osano start under $100/month.

Effort: one day to install. **Impact:** compliance, plus cleaner data flowing into every other tag.

Your 90-Day Paid-Channel Roadmap

A concrete plan for a winery GM or marketing director. Each phase builds on the last. No phase requires a website rebuild, a new agency relationship, or a budget line your CFO will block.

Days 1–30: Measurement foundation

Nothing else in this roadmap works if measurement is not in place. The first month is spent installing the chassis.

1. **Confirm GA4 is firing and recording events.** If you are still on UA, replace it. Verify that pageviews, sessions, and at least one e-commerce event (add-to-cart or purchase) are landing in GA4.
2. **Configure a Google Tag Manager container.** Move every existing tag into it. Future-you will thank current-you the first time you need to update a tag without filing a developer ticket.
3. **Install the Meta pixel through GTM.** Configure standard events: PageView, ViewContent, AddToCart, Purchase. Verify each in Meta’s Events Manager and the Pixel Helper Chrome extension.
4. **Install Google Ads conversion tracking through GTM.** Configure a Purchase conversion at minimum; ideally also Club Signup and Allocation List Join. Link the tag to a real test transaction and verify the conversion fires.
5. **Deploy a consent management platform.** I like CookieYes because it has a prebuilt GTM template. Cookiebot, OneTrust, or Osano are other good options. Wire your GTM container to respect the consent state.

Days 31–60: Audience seeding

With measurement firing, the next 30 days are spent letting audiences build. You are not running paid yet. You are loading the gun.

6. **Build a custom audience of site visitors over the last 180 days.** Build a second of purchasers. A third of club members. These populate automatically once the pixel has been firing for a few weeks.
7. **Connect Klaviyo to Meta Custom Audiences.** Push your active members, lapsed buyers, and waitlist as three separate segments. Set auto-refresh.
8. **Upload your 24-month customer list to Google Ads as Customer Match.** This becomes the seed for Customer Match campaigns and for lookalike audiences in YouTube and Display.
9. **Build lookalike audiences in Meta from your purchaser segment.** Start with 1% lookalike in your region; create 3% and 5% lookalikes for later expansion.

Days 61–90: Paid tests

With measurement firing and audiences seeded, the third month is spent running deliberate, small tests across the two paid channels that matter most. The point of this phase is not return-on-ad-spend. The point is data.

Meta test design. $25-30 per day. Two creative concepts. Test against a 1% lookalike of purchasers plus a broad interest audience. Optimize for Purchase, not link clicks. Run for 14 days minimum before reading results. The cost-per-purchase you measure here is the number that ends the "Meta does not work" debate at your winery.

Google Ads test design. Three campaigns. Branded search at $25–$30 per day (almost always positive ROAS; defends against competitors bidding on your brand). Non-branded search at $30–$50 per day targeted on varietal and regional terms ("Napa Cabernet," "Willamette Pinot Noir," "wine tasting Paso Robles"). Customer Match in YouTube at $20–$30 per day showing a video against your existing customer list to drive repeat purchase. All three measured against Purchase conversion. I will caution you that your match type and what's in your Excluded Keyword list may be as important as your Keywords themselves.

Decision criteria. At day 90, read the data. What is your cost-per-purchase on Meta? On non-branded Google search? Compare to the lifetime value of a new customer (if you do not know this number, that is a separate but urgent conversation). Kill what loses money. Double the budget on what works. Run another 90 days.

On the two pieces of skepticism, revisited

The roadmap above is the test design that answers the "Meta does not work for wineries" objection on your own data, in your own market, with your own customers — not on someone else's benchmark. It is also the test design that answers the "Google Ads no longer matter" objection by exercising the channels within Google Ads that have nothing to do with AI search overviews: branded search, Customer Match, YouTube against your existing customer list. Both objections are answered by measurement. They cannot be answered without it.

> ***This will not guarantee a 5x ROAS in 90 days. It will get you to the point where you can tell whether your marketing is working. From there, execution is what compounds.***

Appendix A: Methodology

The sample

491 winery websites drawn from public directories, industry listings, and Old Vine Marketing's working consulting universe. Regional counts: Napa Valley (139), Sonoma County (107), Willamette Valley (105), Paso Robles (70), Mendocino County (40), Lodi (27), plus three small additional DTC producers in Walla Walla and non-regional appellations included in industry totals. The 491-winery population partially overlaps with the sample used in the companion GEO Readiness Report and Website Age Report.

Twelve additional brands were audited but excluded from the analysis: corporate-umbrella sites with no direct-to-consumer commerce (Jackson Family Wines, Gallo Family Vineyards) and three-tier wholesale-only brands operating branding sites without a DTC channel (Fetzer, Gnarly Head, Delicato, Cycles Gladiator, Scotto Cellars, Meridian, and several others). These brands run real digital marketing programs — often substantial ones — but those programs serve wholesale distribution, retail merchandising, and brand awareness, not DTC acquisition. Scoring them against a DTC-acquisition rubric would have produced misleading low scores and distorted the regional averages.

The detection

Each site was inspected for the following signals, each of which is independently verifiable in the public-facing HTML, the Google Tag Manager container payload, the network requests issued by the homepage, or the domain's public DNS records:

- E-commerce / DTC platform: Commerce7, Shopify, WineDirect, OrderPort, Salesforce Commerce Cloud, Squarespace, eCellar, WooCommerce, VinSuite, OffsetPartners, AMS, Corksy, Drupal Commerce, VinoShipper, Vintegrate, Square Online, custom, or none.
- Google Analytics: GA4 only, GA4 plus UA, UA only ("analytics-dark"), or none.
- Google Tag Manager: present in markup, with at least one container ID resolvable.
- Meta pixel: detected in markup or in the GTM container payload.
- Google Ads conversion tag: detected in markup or in the GTM container payload.
- Other social and advertising pixels: TikTok, Pinterest, Snap, LinkedIn, X.
- Email service provider: detected via DNS — DKIM CNAME delegations, SPF includes, and ESP-specific ownership-verification TXT records. This is the authoritative method. Site-only detection (script tags, signup widgets) is recorded separately as unverified and contributes only when DNS evidence is absent.
- DMARC policy: detected via the _dmarc TXT record. Values categorized as none, quarantine, reject, or missing.

- Additional marketing automation: HubSpot, Microsoft Clarity, Hotjar, Optimizely, StackAdapt, The Trade Desk, ShareASale, and other detectable tools.
- Consent management: Cookiebot, OneTrust, Osano, Iubenda, and others.
- Reservations: Tock, Commerce7 native, CellarPass, FareHarbor.
- Live chat / SMS: RedChirp, LiveChat, HubSpot Chat, Zendesk Chat.

The scoring rubric

A 0–100 rubric weighted toward measurement and paid-acquisition readiness. Signals are awarded points as follows: Google Tag Manager (+20), Meta pixel (+15), Google Ads conversion tag (+10), GA4 active (+10), consent management platform (+10), modern e-commerce platform (+10), additional ad or social pixels (+5 each, capped at +10), marketing automation tool (+5). A site with no detectable DTC platform is penalized -10. The Capable tier is 60 and above; Intermediate is 30–59; Beginner is below 30. The rubric is intentionally transparent so that a winery can replicate the calculation for itself.

Known caveats

- Capability detection is not usage detection. This report measures whether the infrastructure is in place to run a measurable digital marketing program. It does not measure whether the winery looks at the data, makes decisions on it, or runs disciplined paid-channel tests. Capability is necessary for measured marketing. It is not sufficient.
- Pixel detection reflects what is configured, not necessarily what fires after cookie consent. Pixels that only fire after the visitor accepts consent and never appear in markup or the GTM payload could be undercounted. Spot validation against wineries with known stacks suggests the Meta and Google Ads numbers in this report are accurate within +/- 3 percentage points.
- DNS-based ESP detection identifies what each winery has authorized to send mail on the domain's behalf. It does not distinguish marketing volume from transactional or operational sending, and it does not detect ESPs that send through a generic relay (SendGrid, Mailgun, Amazon SES) without their own DNS footprint. Some wineries authorize multiple ESPs because of layered programs; others do so because of incomplete migrations. The data cannot reliably distinguish the two cases.
- Server-side tag deployments are not separately tracked in this dataset; sites using server-side tagging may receive partial credit for client-side signals but not the full server-side stack.
- The sample is biased toward wineries with public-facing websites. Producers operating exclusively through allocation lists with no public site are not represented.
- Detection date: data collected April–May 2026. Winery digital stacks change, occasionally rapidly, and any individual winery's score may have moved by the time you read this.

Appendix B: The 15-Question Self-Audit

A 30-minute diagnostic any winery GM or marketing director can run on their own site to estimate where their digital marketing stack sits today. Each question is binary: yes or no. Count your yeses and reference the scoring band at the bottom.

Measurement foundation (5 questions)

1. Can you open analytics.google.com today and see traffic data from this week?
2. Is your Google Analytics property a GA4 property (the property ID begins with “G-”, not “UA-”)?
3. Is a Google Tag Manager container installed on every page of your site?
4. Is there a consent management platform (CookieYes, Cookiebot, OneTrust, Osano, or equivalent) on your site?
5. Can you, or your developer, modify a tag without touching the underlying site code?

Paid-channel readiness (5 questions)

6. Is a Meta pixel installed on your site (verifiable in the Meta Pixel Helper Chrome extension)?
7. Is a Google Ads conversion tag installed on your site, firing on at least one revenue event (purchase, club signup, or allocation request)?
8. Do you have at least one retargeting audience built in Meta (“site visitors past 30 days” counts)?
9. Have you uploaded your customer list to Google Ads as a Customer Match audience in the past 12 months?
10. Do you have a lookalike or similar audience built from your purchasers in Meta?

Lifecycle and acquisition integration (5 questions)

11. Are you running a lifecycle email tool (Klaviyo, Mailchimp, or similar) connected to your e-commerce platform?
12. Is your lifecycle email tool connected to Meta Custom Audiences (segments push automatically)?
13. Do you measure cost-per-acquisition for new club members from at least one paid channel?
14. Do you know the lifetime value of a new club member to at least one significant digit?
15. Have you run a paid Meta or Google Ads campaign in the last six months and read the conversion data?

Scoring band

- **12–15 yeses: Capable.** You are in the top tier of the industry. The remaining work is optimization.

- **7–11 yeses: Intermediate.** Most of the infrastructure is there. The five gaps in this report will get you to Capable in 90 days.
- **0–6 yeses: Beginner.** The 90-day roadmap in this report is exactly what you need, in the order presented.

OLD VINE MARKETING

About Old Vine Marketing

Old Vine Marketing is a direct marketing consultancy built specifically for wineries. Founded in 2006 and based in Napa, California, the firm helps wineries grow direct-to-consumer revenue through the channels that matter most — wine clubs, tasting room conversion, email and CRM, customer segmentation, and, increasingly, machine learning and artificial intelligence. The practice is named for the kind of vines we admire: older, experienced, more concentrated in what they produce. Our engagements look the same — fewer clients, deeper work, and a long view on the relationship between a winery and its customers. Learn more about Old Vine Marketing at https://oldvinemarketing.com.

About Steve Bowden

Steve Bowden is the Principal of Old Vine Marketing. He brings a rare combination to the wine industry: an MBA paired with a Master of Science in Analytics and Statistics, and more than two decades of operator-level experience running direct-to-consumer programs for working wineries — not just consulting on them. Most recently, Steve served as Senior Vice President of DTC Analytics and Strategy at French American Vintners overseeing the performance of Sequoia Grove Winery in Napa, St. Francis Vineyards & Winery in Sonoma and Résonance in Willamette Valley. Steve spent 12 years as Vice President of Sales and Marketing at Sequoia Grove Winery in Rutherford (one of the 36 perfect-scoring wineries in this report), with earlier director-level roles in customer relationship marketing at Robert Mondavi Winery and The Hess Collection. Prior to joining the wine industry, Steve led a team of programmers, project managers and statisticians responsible for credit, collections and fraud detection strategy at Sprint Corporation (now T-Mobile) in Kansas City.

The combination of a winemaker's creativity, a marketer's instinct, and a statistician's comfort with data is what shapes the research behind reports like this one. Steve can be reached through LinkedIn (linkedin.com/in/stevenjbowden) or via email at steve@oldvinemarketing.com.

Data file: results.csv (491 DTC wineries)

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