

2025 INDUSTRY REPORT

# THE STATE OF *Winery Health*





# TABLE OF Contents

Introduction	01
Survey Demographics	02
CHAPTER ONE	
What Sets Healthy Wineries Apart	03
CHAPTER TWO	
Financial Health Trends & Insights	07
Understanding Profit Margins	09
Sales Trends, Cost Tracking & Profitability	11
What it Takes to Be a Profitable Winery	14
CHAPTER THREE	
Operational Health Trends & Insights	16
Building Blocks of Operational Health	18
Breakdown of DTC vs. Wholesale	21
Operational Ripple Effect	22
CHAPTER FOUR	
Cultural Health Trends & Insights	24
Job Satisfaction & Culture	26
Impact of Community Involvement	28
Cultural Ripple Effect	29
CHAPTER FIVE	
Final Thoughts	30



# Introduction

**I'm thrilled to bring the State of Winery Health Report to the industry for a second year.**

With two years of data, we can now identify patterns, measure momentum, and begin to understand how business health is evolving across the industry.

Some of the findings are encouraging. Others are a wake-up call. But one thing is clear: the strongest wineries today share a common mindset. They're financially disciplined, operationally focused, creatively positioned, and powered by great teams. I like to think of this as a "get fit" movement, where wineries are staying lean while continuing to build their market strength.

**Even in a year marked by a few industry curveballs, I'm inspired by the passion and perseverance that run deep in this industry.**

Wine isn't just another beverage. It's rooted in place, in people, in craft. That's what makes it special. But to keep doing what we love, we need to run businesses that are sustainable and built to last.

This report is one way we hope to support that. It's full of data, insights, and benchmarks from over 500 winery professionals - owners, winemakers, finance leaders, sales and marketing teams - offering a collective look at what healthy wineries are doing differently.

I'm grateful to everyone who contributed, and I hope this year's findings help guide your decisions, spark conversations, and move your business forward.

## Cheers!



**Ashley DuBois Leonard**  
*Founder and CEO, InnoVint*

A handwritten signature in white ink that reads "Ashley DuBois Leonard".



# Survey Demographics & Methodology

To understand the current state of the wine industry, we surveyed 500+ professionals across a wide range of regions, roles, and production sizes. This diverse participation — from small producers to large-scale operations, from winemakers to executives — provides a well-rounded snapshot of winery health today. By analyzing these responses, we identified meaningful patterns and actionable insights to help wineries benchmark their performance and make informed decisions for the year ahead.

Role	
Owner	17%
Executive Leadership	13%
Winemaking Leadership	27%
Winemaking Staff	24%
Viticulture/Grower Relations	2%
Finance	6%
IT & Compliance	2%
Sales & Marketing	7%
Other	2%

Annual Case Production	
<1,000	7%
1,000–2,499	12%
2,500–4,999	15%
5,000–9,999	14%
10,000–24,999	18%
25,000–49,999	8%
50,000–99,999	8%
100,000–249,999	5%
250,000+	10%
I don't know	3%

Location	
Napa County, CA	23%
Sonoma County, CA	21%
Central Coast, CA	10%
Central Valley, CA	4%
Rest of California	3%
Oregon	6%
Washington	8%
Midwest	5%
East Coast	6%
Rest of U.S.	5%
International/Non-U.S.	8%



# What Sets Healthy Wineries Apart

What factors contribute to a winery's overall health? What distinguishes the most successful wineries?

In this section, we spotlight the key insights from wineries that rated themselves as having excellent overall health.

By analyzing what sets these high-performing wineries apart, we've identified the unique behaviors and business strategies that drive their success. These insights provide valuable benchmarks for the rest of the industry to follow.





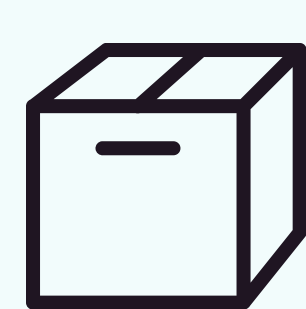
# Two Different Realities: Healthy vs. Unhealthy Wineries

Our analysis revealed striking differences between wineries that rate themselves as healthy vs. unhealthy. **Here's how the healthiest wineries stand out:**



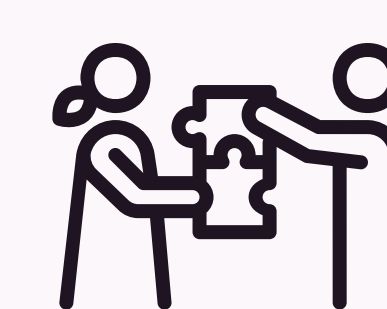
## 3x more likely to be profitable

Healthy wineries are more than three times as likely to be profitable, with 83% reporting positive profitability compared to just 27% of unhealthy wineries. They also see stronger sales momentum — 52% report sales trending upward, compared to only 15% of unhealthy wineries, indicating a healthier market position.



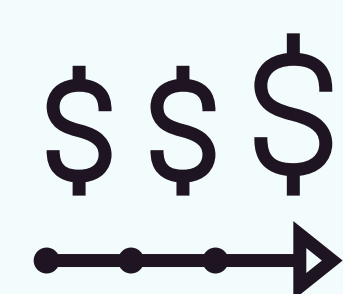
## Direct-to-Consumer focused

A higher focus on DTC sales is another clear differentiator. Healthy wineries average 72% of their revenue from DTC channels, compared to 63% for unhealthy ones, making them less reliant on wholesale (25% vs. 35%). This shift toward DTC helps them retain better margins and build stronger customer relationships.



## Stronger people & culture

Nearly 9 out of 10 satisfied employees work for healthy wineries, and only 8% of healthy wineries report high turnover, compared to nearly 30% of unhealthy ones. Healthier wineries also report stronger collaboration and a more positive workplace environment, which reinforces long-term stability.



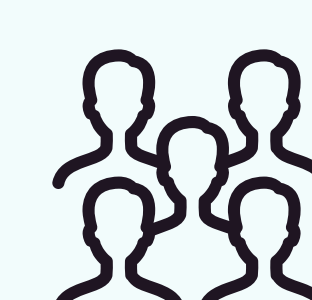
## Stronger pricing confidence & healthier margins

Healthy wineries have far greater pricing power. Nearly 30% are extremely confident in their pricing strategy, versus only 7% of unhealthy wineries. This confidence translates directly to margins: only 36% of healthy wineries report net margins under 10%, compared to 84% of unhealthy wineries, giving them more stability and room to reinvest in growth.



## More tech-enabled & data-driven

Healthy wineries embrace technology and data to guide decisions. Over half are above average in tech adoption, compared to only 39% of unhealthy wineries, and 52% are ahead in using data-driven decision-making (vs. 33%). This operational strength allows them to work more efficiently and respond quickly to market changes.

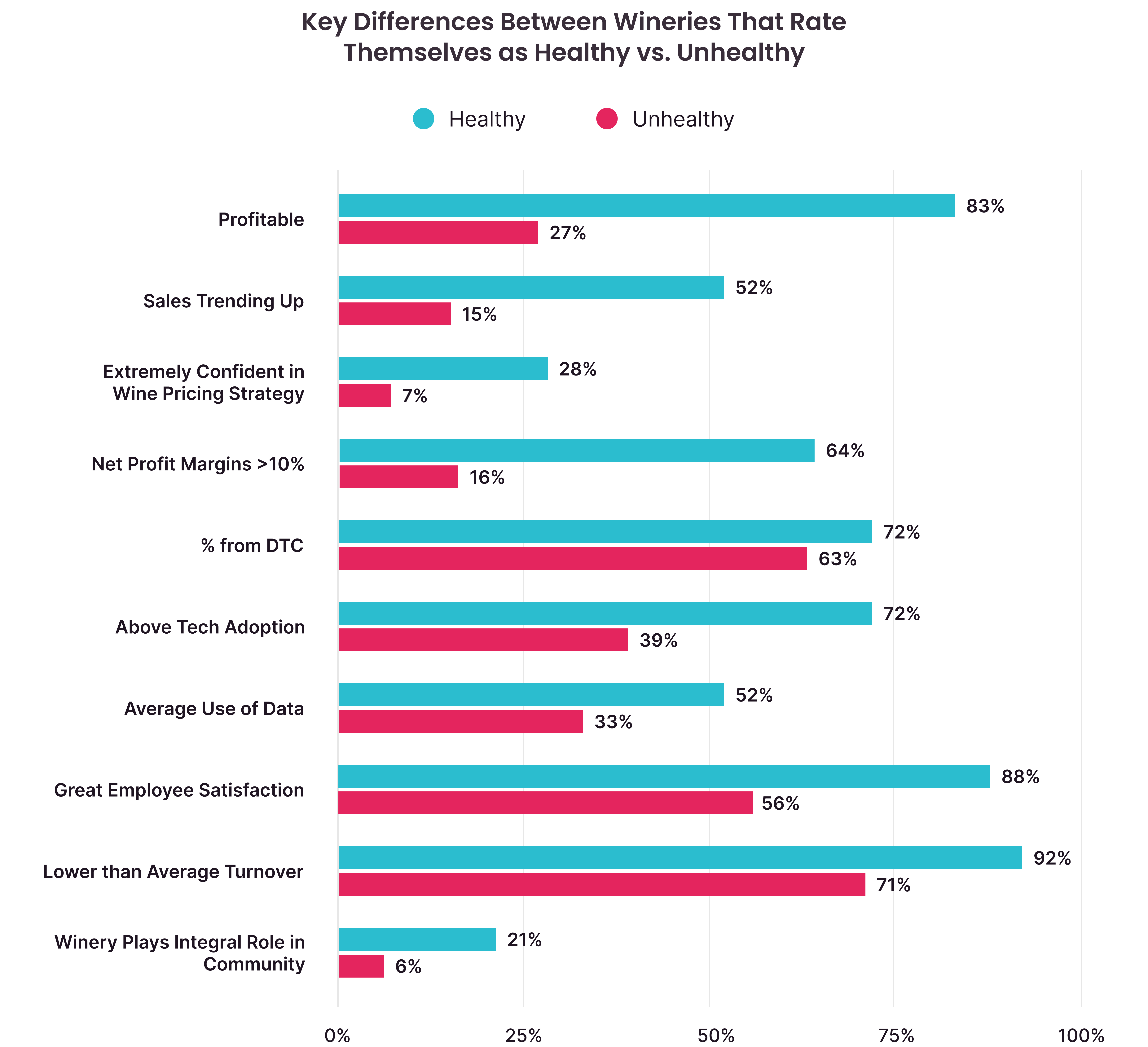


## More connected to their community

Healthy wineries are more deeply rooted in their local communities. 21% describe themselves as integral to their community, versus only 6% of unhealthy wineries, and many more actively engage in local partnerships, events, and initiatives that strengthen their brand beyond the tasting room.



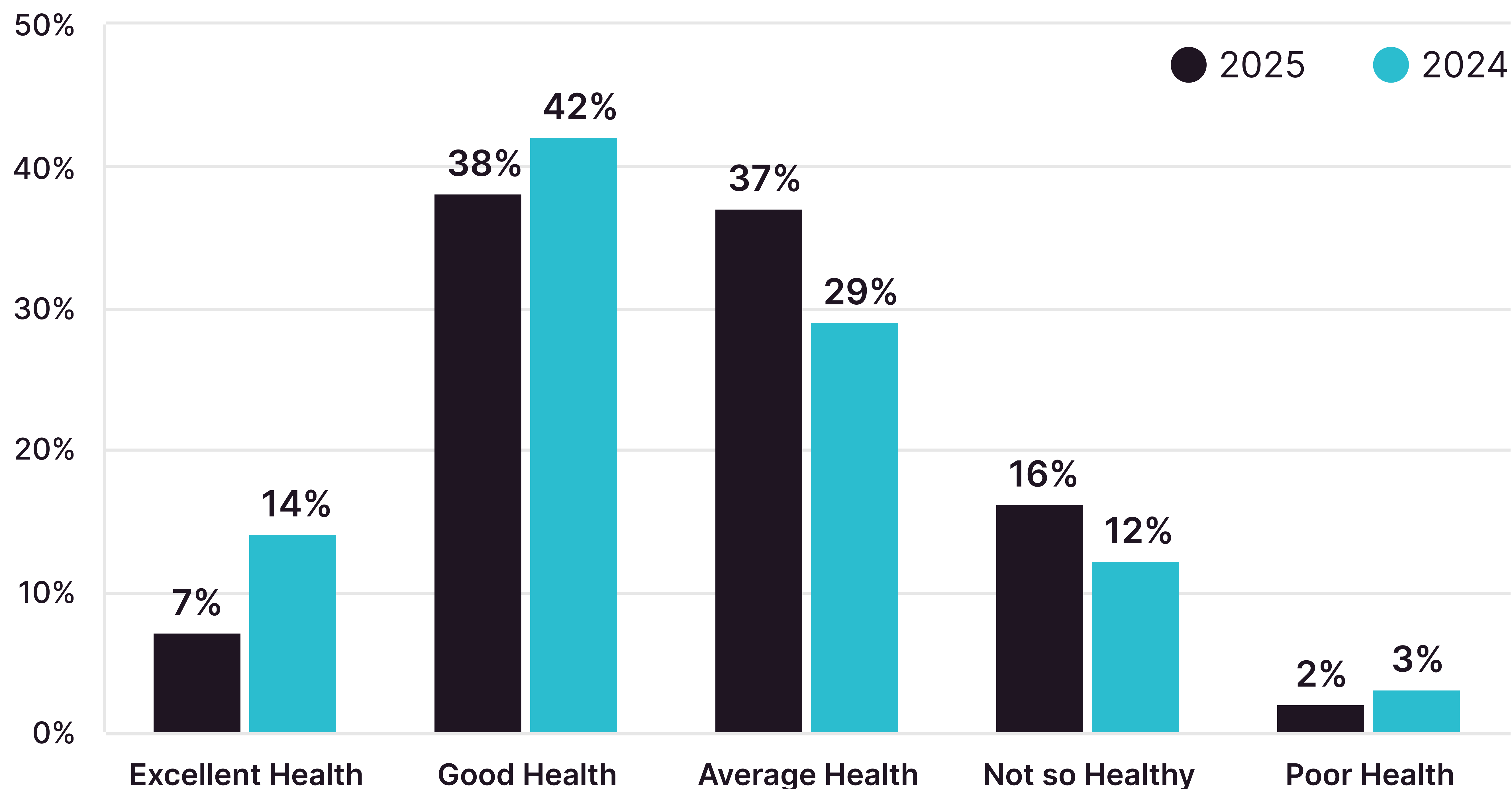
Our statistical analysis confirmed that all three dimensions matter, but financial performance stands out as the clearest signal of overall business health. Profitability, sales trends, and pricing confidence had the strongest measurable relationships with health ratings, while operational practices and cultural factors reinforced long-term success in more subtle ways.



Healthy wineries consistently outperform their peers. They’re more profitable, confident in pricing, tech-enabled, and community-connected.



# How Would You Rate Your Winery's Overall Business Health?



45% of winery professionals rate their **company's overall health as Great or Excellent, down from 56% in 2024.**

The biggest shift came from fewer wineries rating their health as “Excellent,” dropping from 14% to just 7%. Instead, more wineries placed themselves in the “Average” or “Not so healthy” categories. It’s a sign that, for many, this year has been tougher.

Respondents also shared comments that provided additional context that we analyzed. The biggest factors holding wineries back? Rising costs, softer wine sales, and market uncertainty were the most common hurdles. Many wineries said they’re running lean, managing costs carefully, but feeling the pressure on revenue growth and profitability.

But it’s not all bad news. Some wineries are still seeing year-over-year growth, even if it’s slower than before.

Others are staying financially healthy by diversifying their revenue streams, with weddings, events, and hospitality helping balance out lower wine sales. And a few pointed to disciplined cost control as the reason they’ve remained profitable despite broader headwinds.

**The bottom line: Most wineries aren’t struggling, but fewer feel like they’re thriving.**

“Wine sales have been slightly lower, but we are well diversified with events, weddings, corporate events, an Inn, and more.”

“Thanks to aggressively conservative cost control, we have been in the black for 5 years straight.”

“We are inventory-heavy with lighter sales. The tariffs have destroyed our export markets”

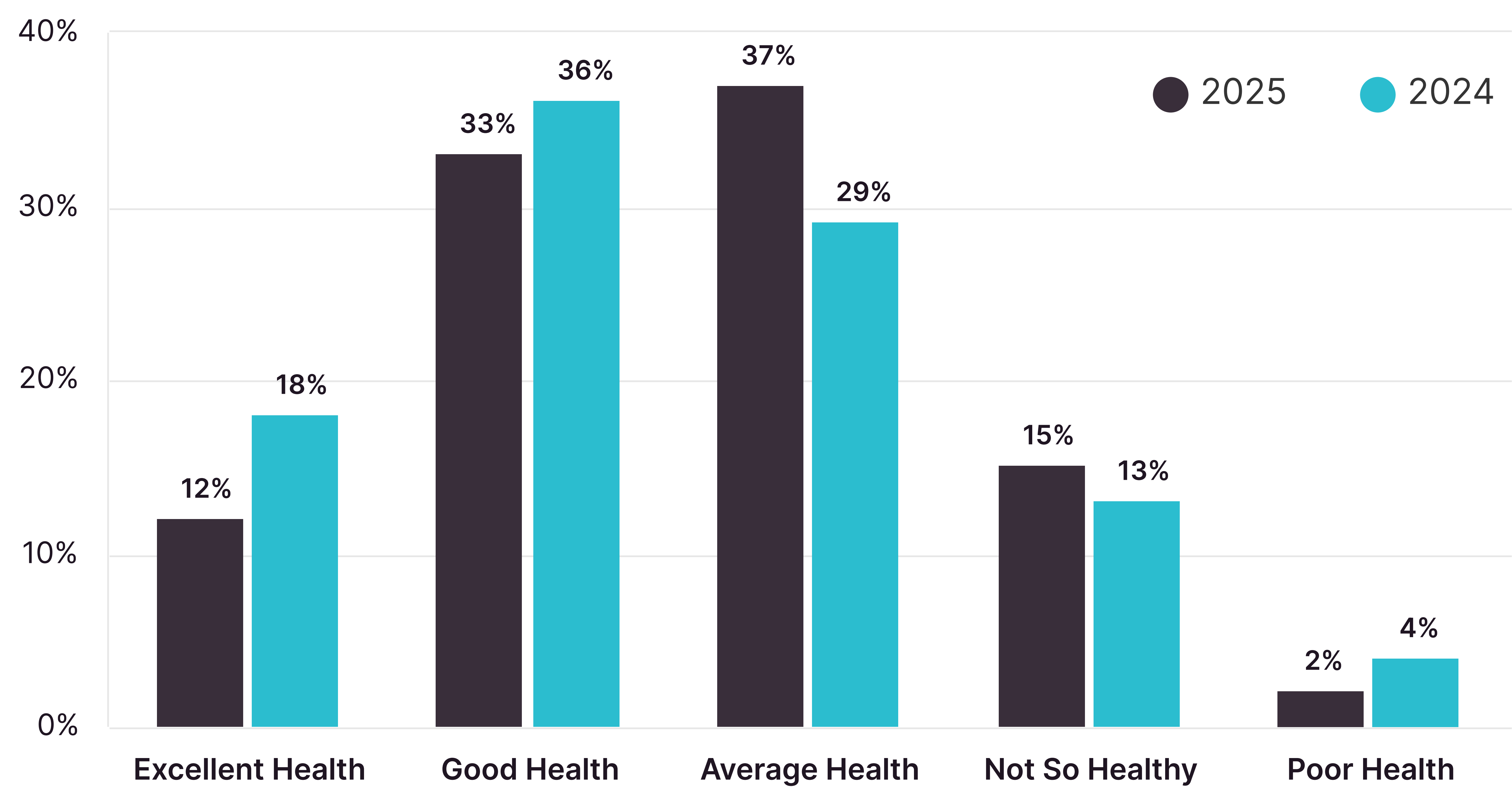


# Financial Health Trends & Insights





# How Would You Rate Your Winery’s Financial Health?



**45% of winery professionals rate their company's financial health as Great or Excellent, down from 54% in 2024.**

When asked to describe their winery’s financial health, responses reflected a wide spectrum of experiences.

For many, the most significant challenge was rising operational costs (like labor and supplies) outpacing revenue growth. This has meant delaying equipment upgrades or facility improvements. Softening sales and consumer hesitation, particularly in direct-to-consumer (DTC) channels, have put an additional strain on their bottom line.

On the positive side, some highlighted the financial discipline that has helped them weather uncertainty. Lean, efficient operations and conservative financial management were cited as ways wineries are staying afloat, even when growth feels out of reach.

“Our winery has operated with minimal oversight of its financials for a long time, largely due to the wealth of our owner. However, we are starting to look into it more as we progress, including the recent hiring of a CFO. Our finances aren't perfect, but we are taking steps to make them more sustainable in the long term.”

“We are a growing winery that is investing in growth, we are on track with our business plan toward profitability.”

“We’ve experienced a huge downturn in visitation and wholesale sales.”

“Sales are down and costs are up. We have lost money 2 years in a row.”

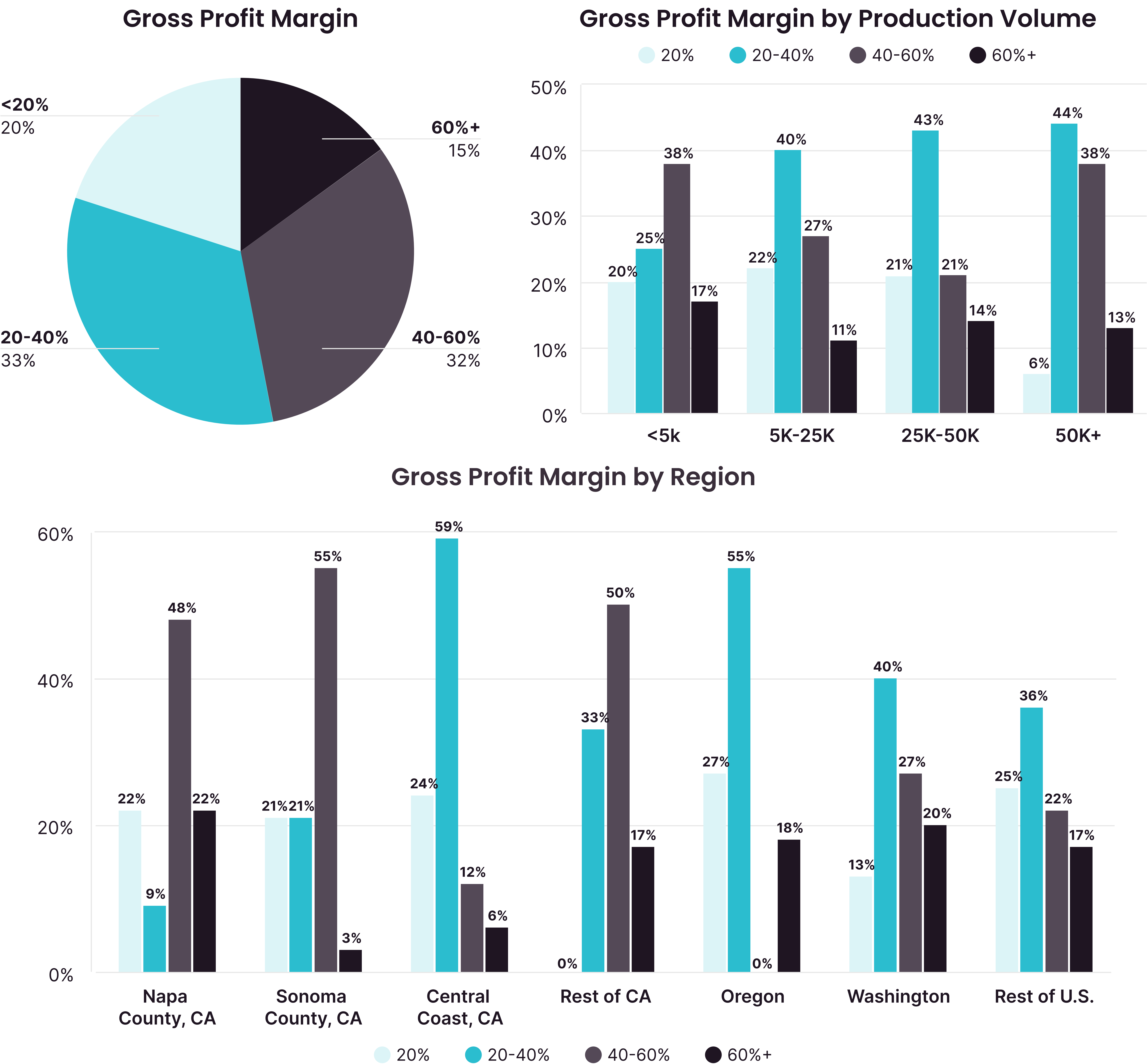


# Understanding Profit Margins

Profit margins are a key indicator of a winery’s financial health, reflecting both operational efficiency and long-term sustainability. The following charts present Gross and Net Profit Margins by production volume and region, offering a snapshot of how profitability varies across the industry.

## Gross Profit Margins

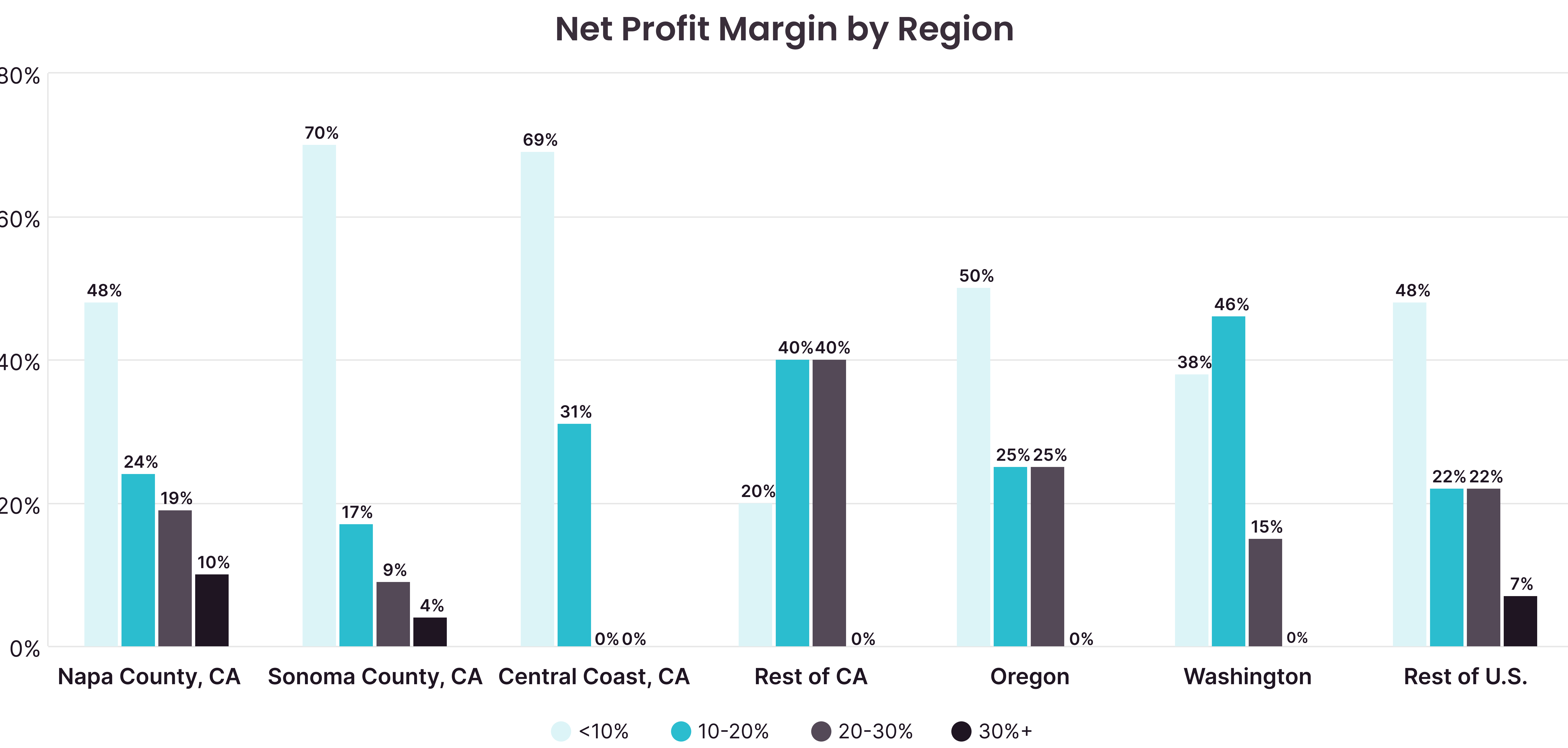
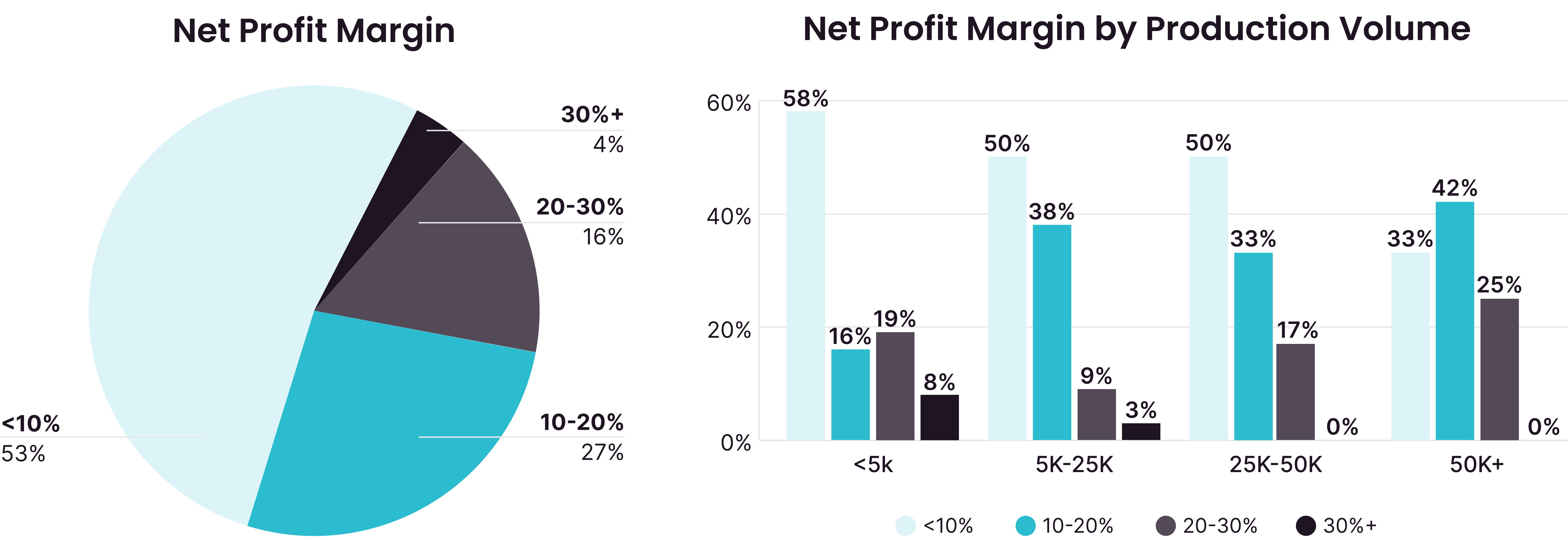
Gross Margin indicates how much revenue a winery makes after subtracting the cost to make the wine — like grapes, packaging, and production labor. **Example:** If you sell a bottle for \$32 and it costs \$15 to produce, your gross profit is \$17, and your gross margin is 53%.





# Net Profit Margins

Net Margin indicates how much revenue a winery makes after subtracting all expenses - not just the cost to make the wine, but expenses like marketing, rent, administrative costs, and taxes. **Example:** If your gross profit is \$17 per bottle, but it costs another \$12 in operating expenses, your net profit is \$5 per bottle, and your net margin is about 16%.



## What’s Considered a ‘Healthy’ Profit Margin?

We often get asked: What numbers should wineries be aiming for when it comes to profitability?

While there’s no one-size-fits-all answer, this framework, developed in collaboration with our trusted partner Erik McLaughlin of METIS, a winery mergers & acquisitions firm, offers helpful benchmarks for key financial indicators. Of course, every winery is unique, and there are always exceptions.

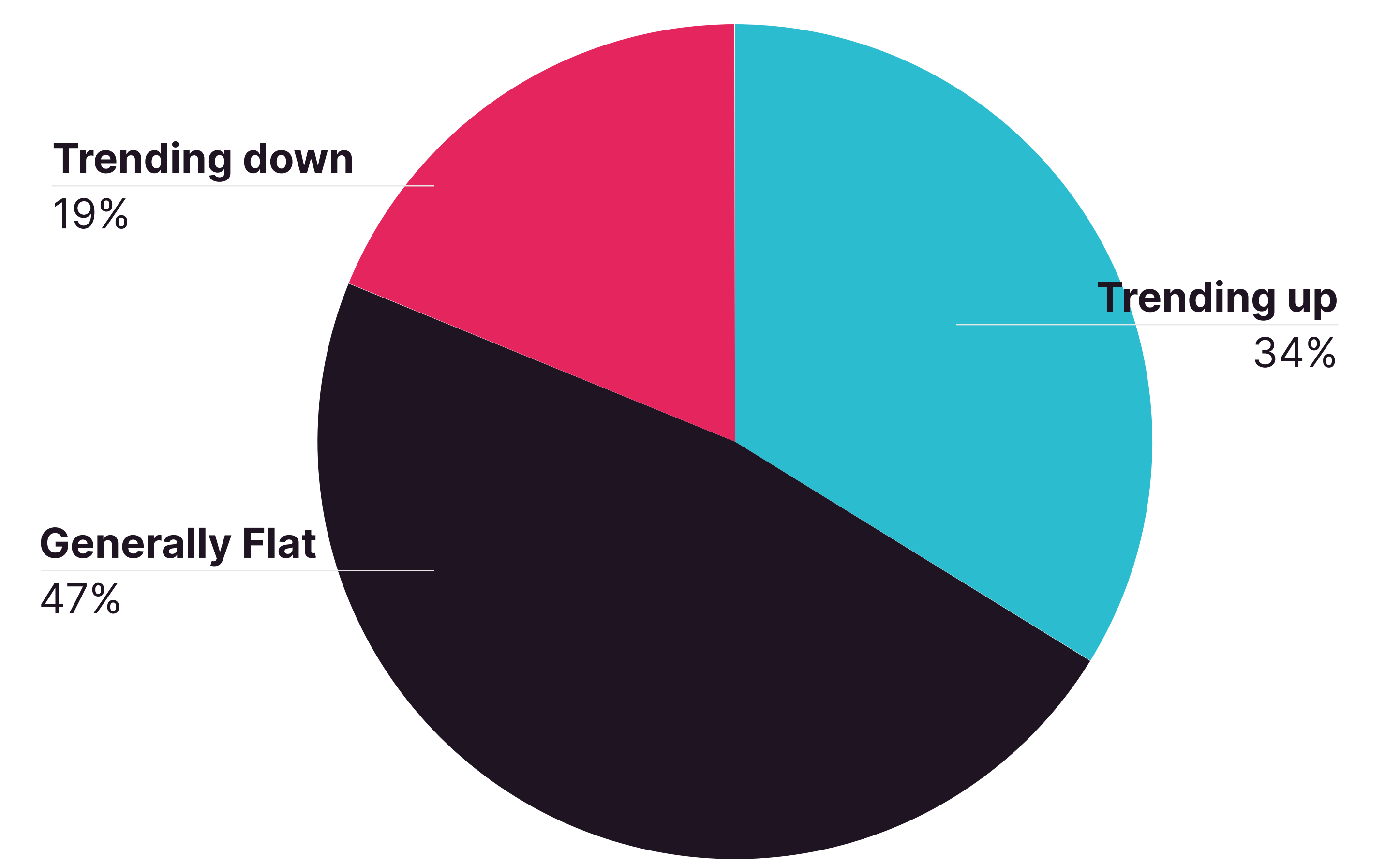
For most, these targets can serve as a useful gut check:

Key Financial Performance Indicator	Poor	Okay	Great
Wholesale Gross Margin	<40%	40%	>40%
DTC Gross Margin	<60%	60%	>70%
Blended Gross Margin (Wholesale +DTC)	40%	50%	60%
Net/Operating Profit Margin	<10%	15%	>20%



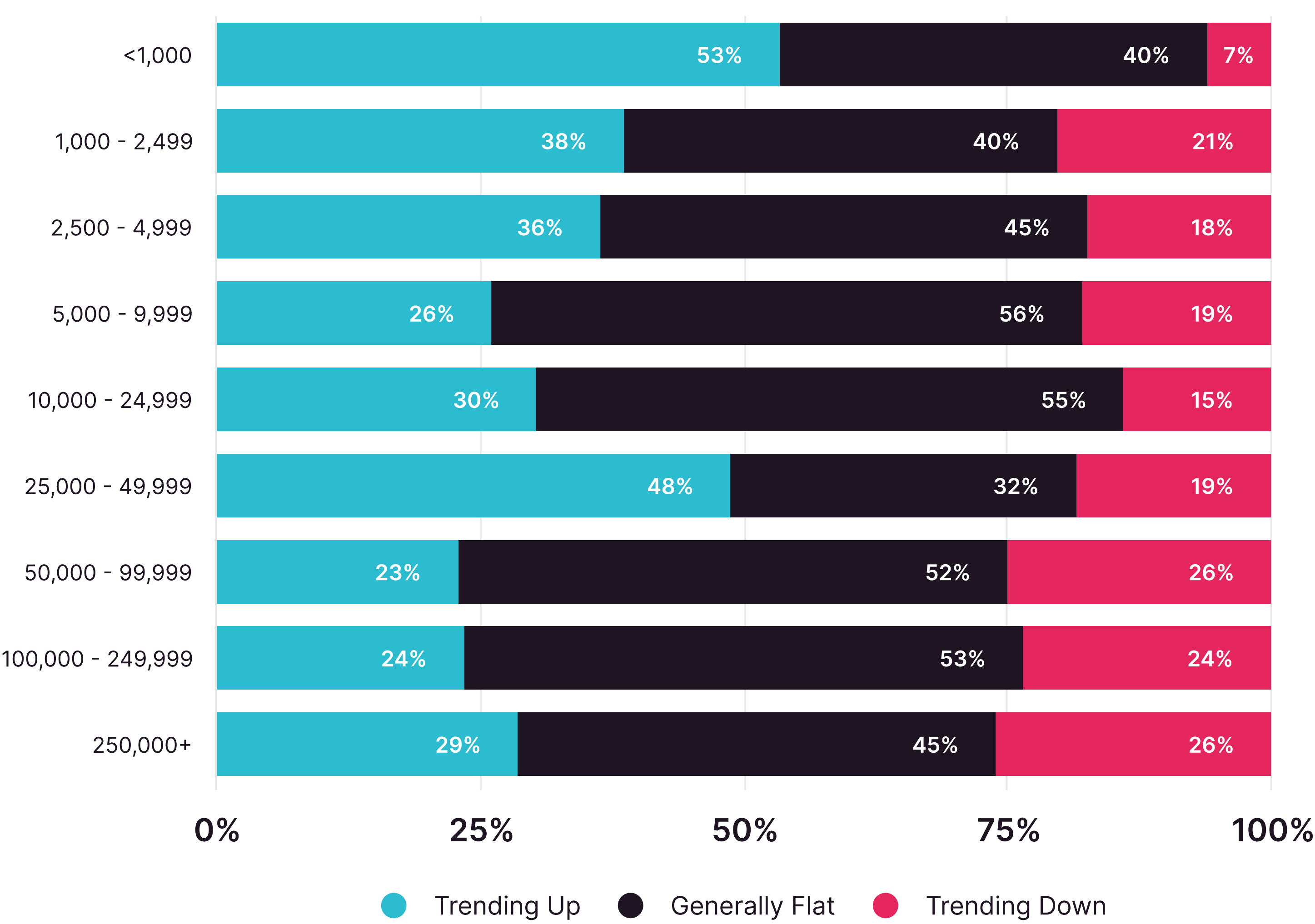
# Sales Trends

Are your winery sales trending up, down, or generally flat?



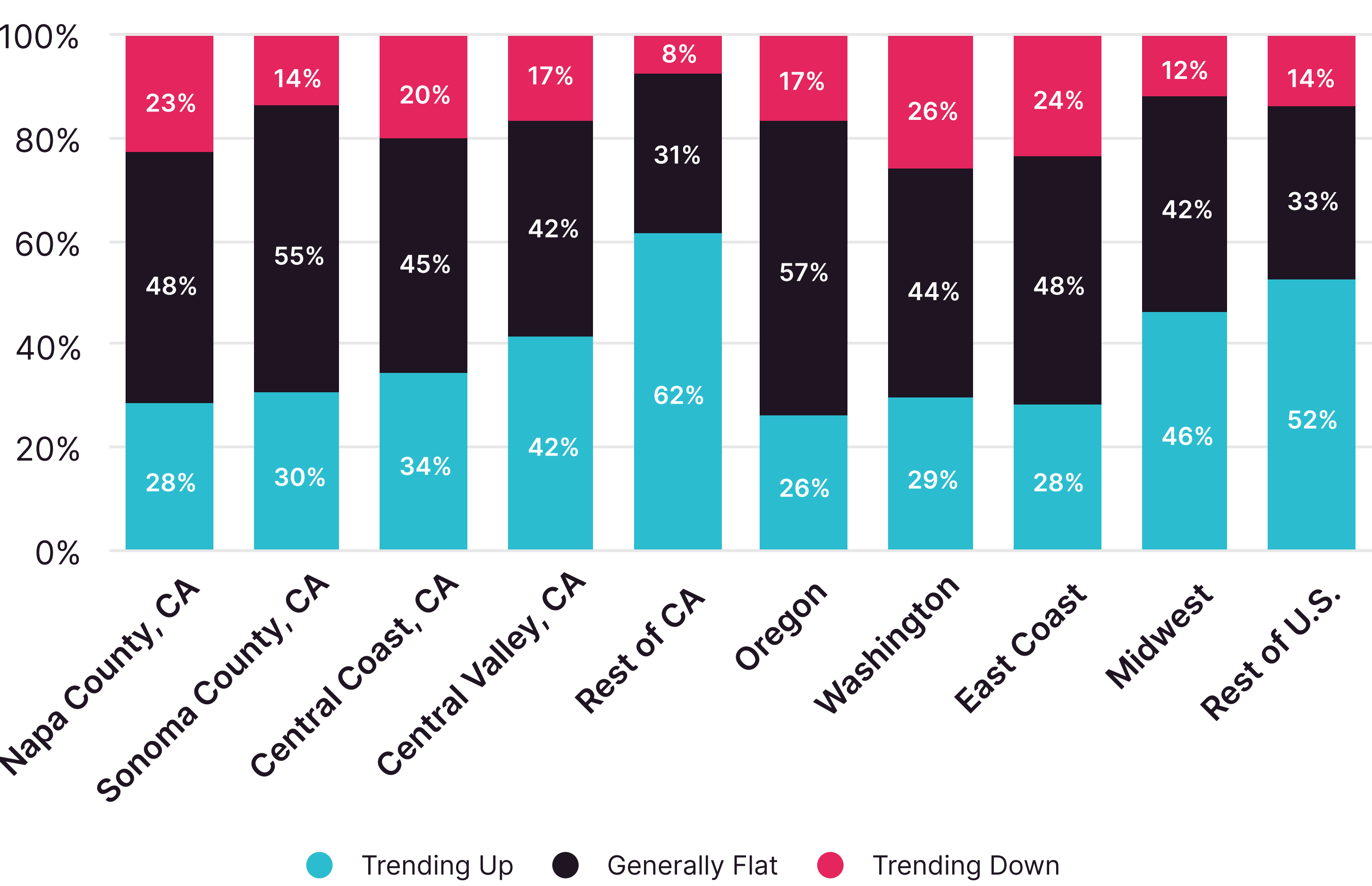
80% of wineries report that their sales are either stable or increasing, demonstrating resilience even in a challenging market and ongoing headwinds for the wine industry.

## Sales Trends by Production Volume



When we look at the data by annual production volume, we see that smaller producers show the highest share of growth. The largest producers have the highest proportion of declining sales and face more stagnation.

## Sales Trends by Region



- When we look at the data by region, there are a few potential takeaways to glean:
- **Premium regions are seeing the greatest reduction in sales velocity.** Napa and Sonoma show the highest rates of decline (up to 23%) and the lowest growth (around 30%).
  - **The Pacific Northwest is mostly stagnant.** Oregon and Washington have the majority of wineries reporting flat sales, with limited growth and notable decline.
  - **Emerging regions are driving growth.** The Rest of California (outside major AVAs) and the Rest of the U.S. show the strongest momentum, with over half of wineries reporting sales increases and fewer facing declines.



# Cost Tracking, Pricing Confidence, and Profitability Insights

Most wineries know their costs and feel confident in pricing, but true profitability insight still lags.

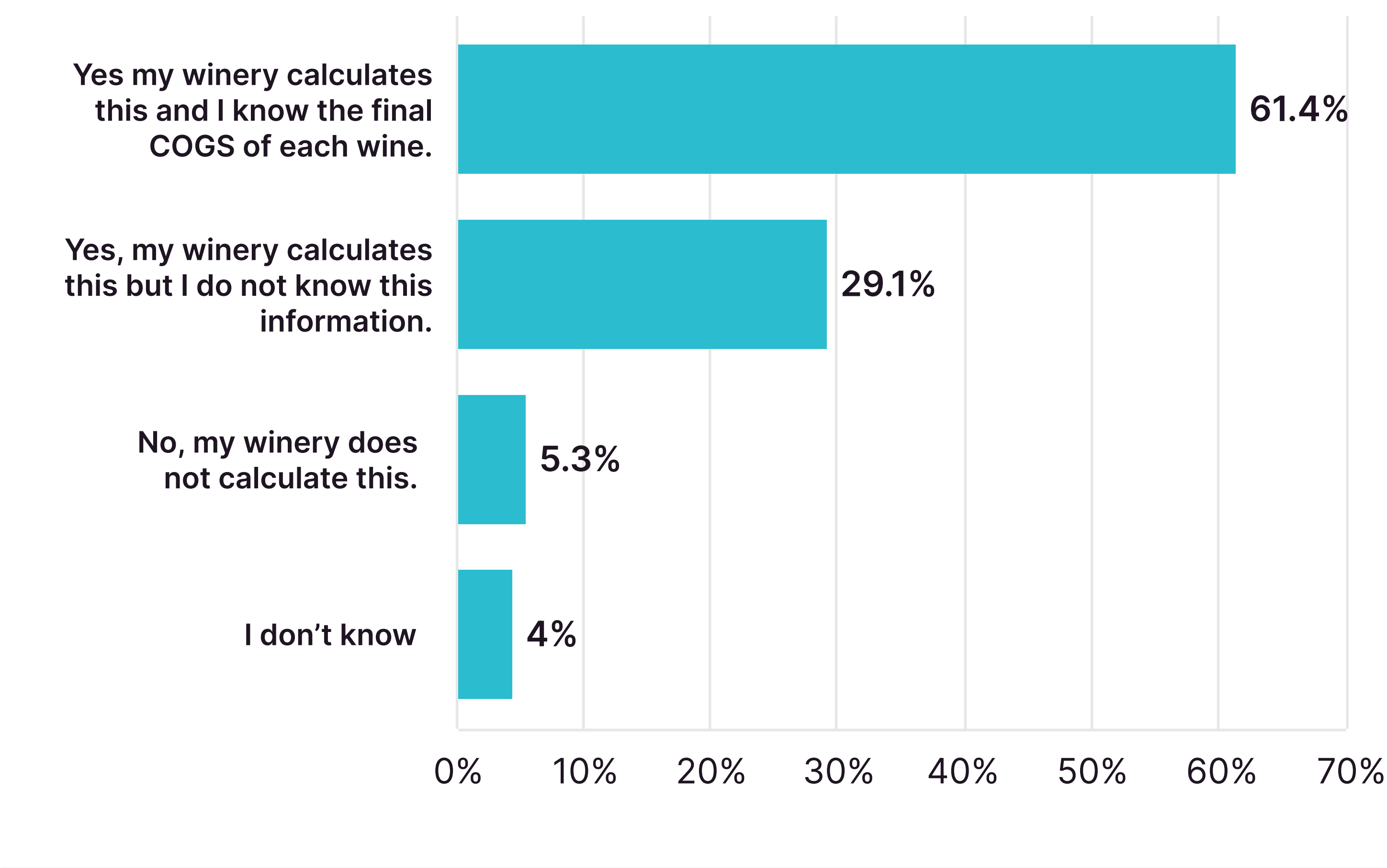
While 90% of wineries calculate production costs and 73% feel confident in their pricing, just 38% know their true per-product profitability.

### What Wineries Are Saying

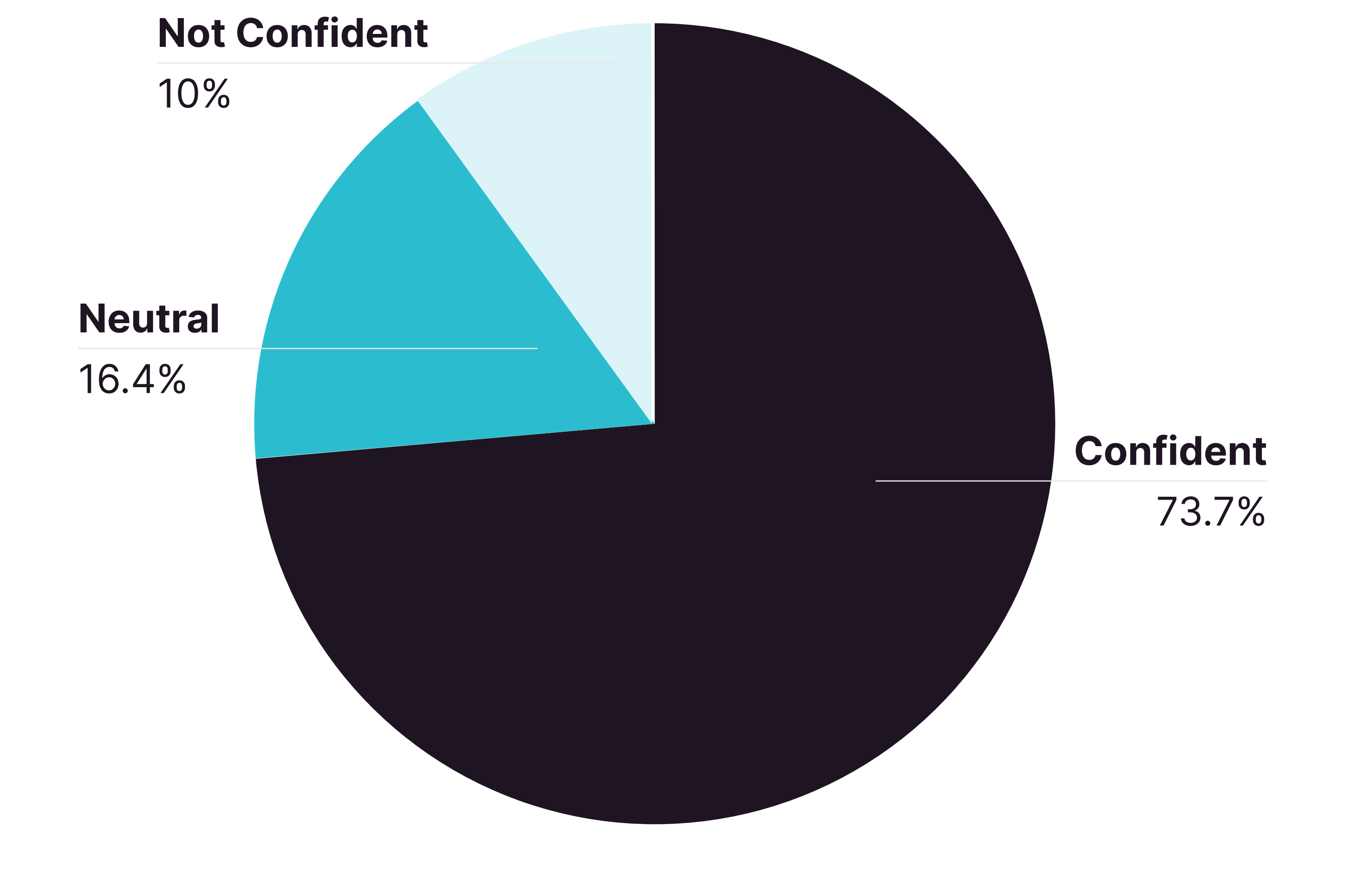
While the majority of wineries feel confident about pricing, many acknowledge ongoing challenges.

Respondents shared that rising production costs, international tariffs, and soft market demand are creating tension between maintaining healthy margins and meeting consumer expectations. Some wineries are grappling with the need for more rigorous cost analysis, while others worry that even justified price increases may trigger sticker shock. The result is a delicate balancing act — navigating profitability without pricing themselves out of the market.

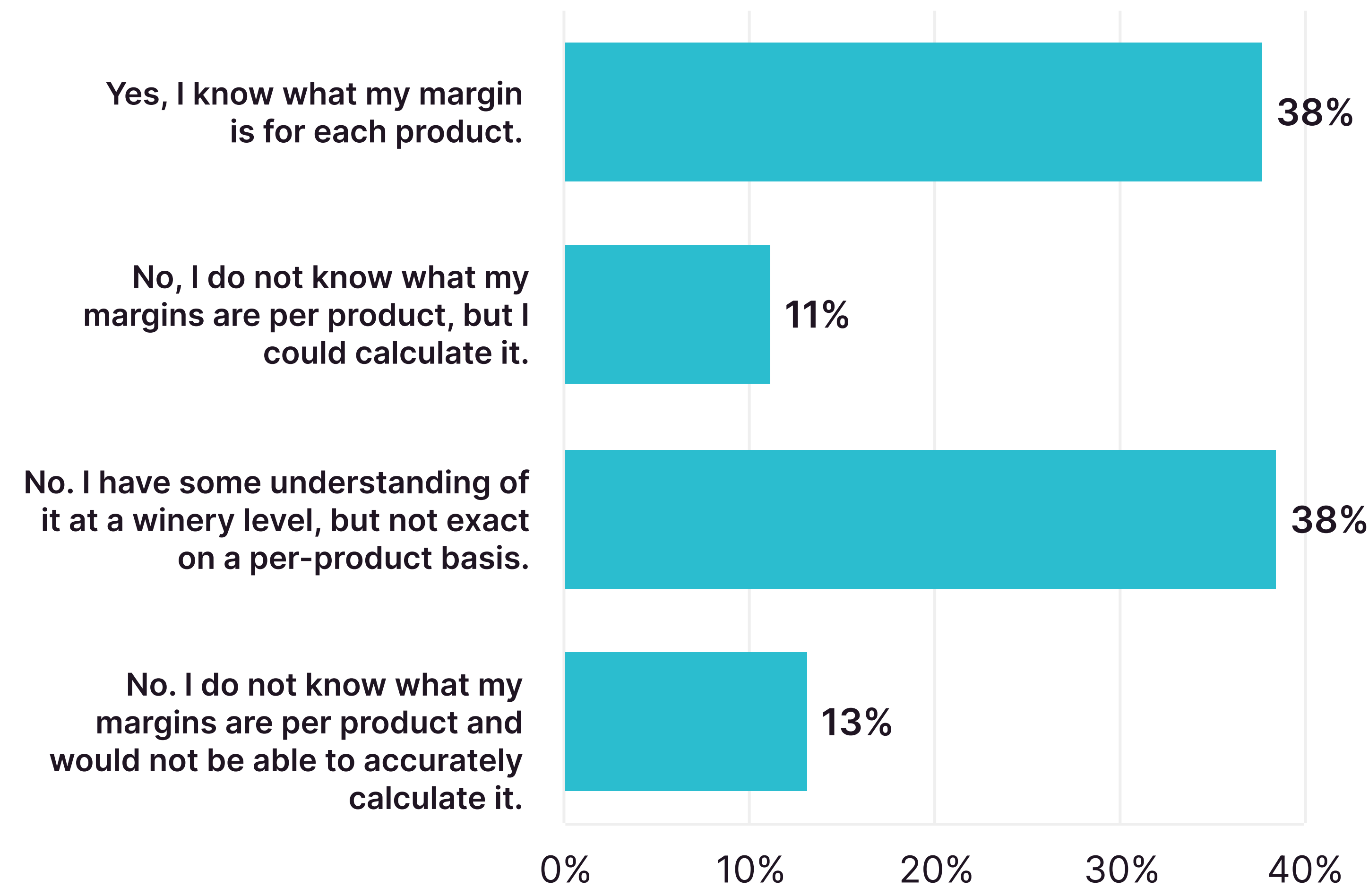
Do you know how much it costs to make each wine your winery produces?



How confident are you that your wines are priced appropriately?



Do you know your per-product profit margins?





# Inside the Profitability Gap

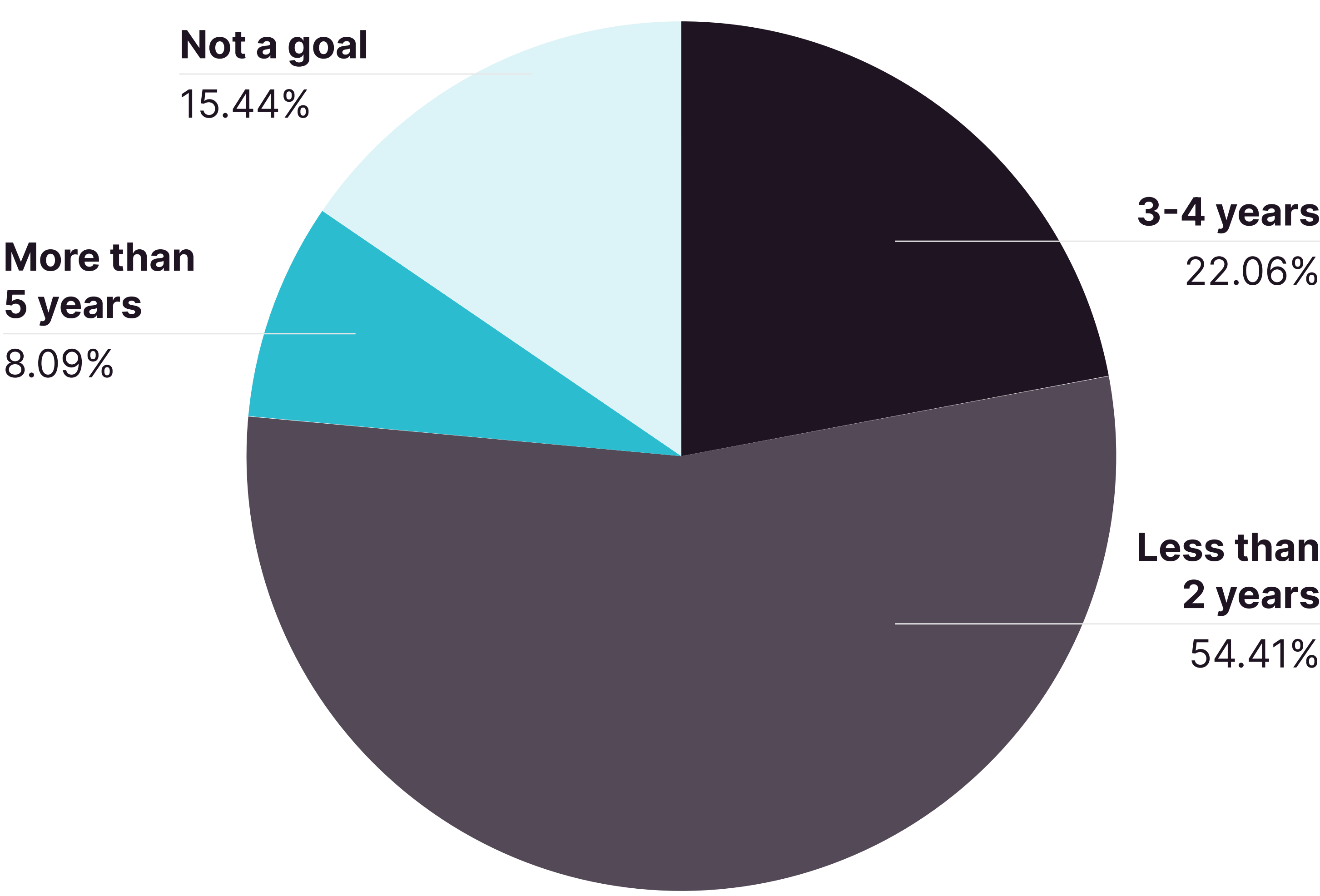
Profitability remains elusive for many wineries, but not out of reach.

**62% of winery professionals indicated their winery is currently profitable.**

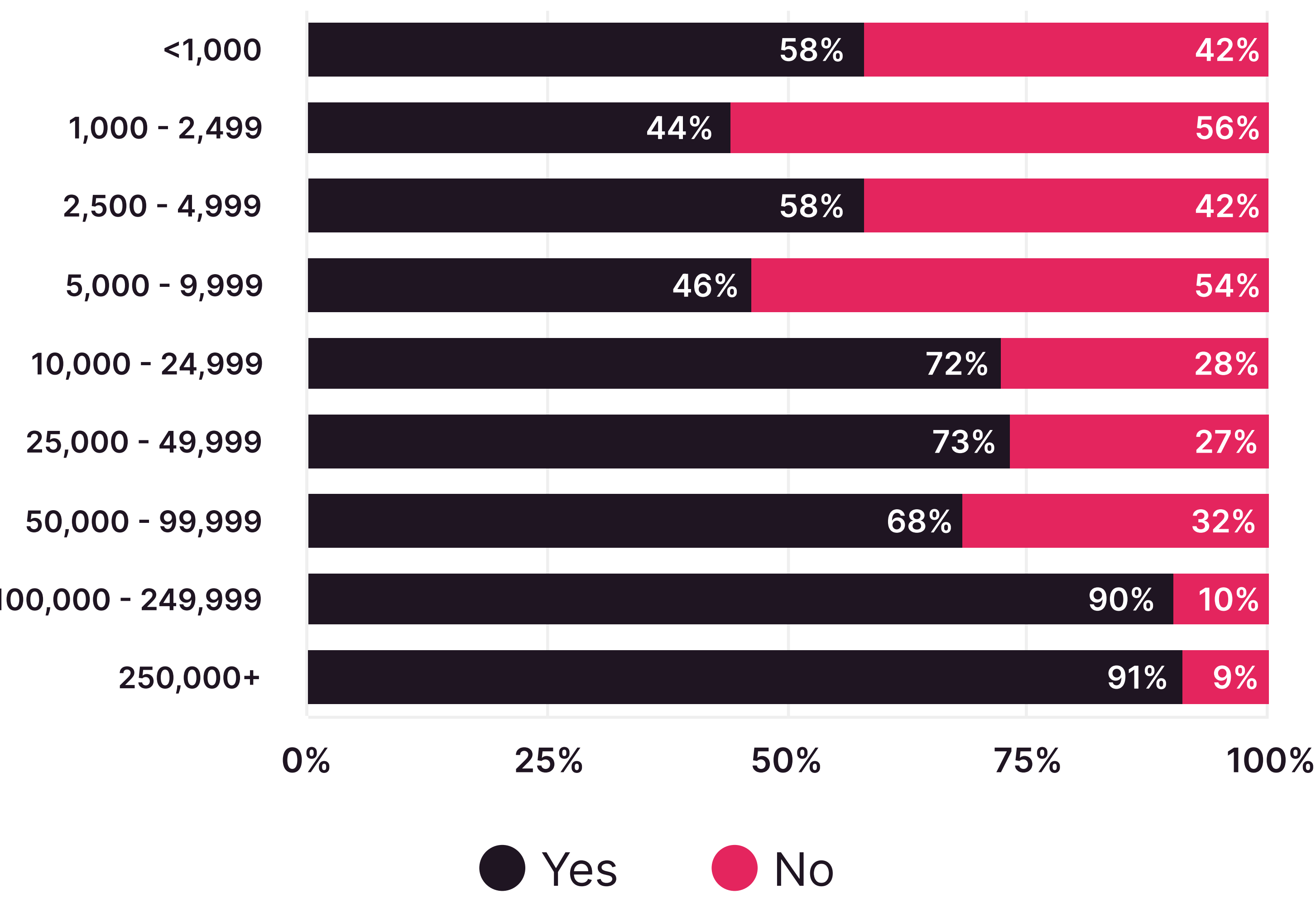
Of those not yet profitable, most have a plan to get there.

## Target Timeline To Profitability

(for wineries that are not yet profitable)

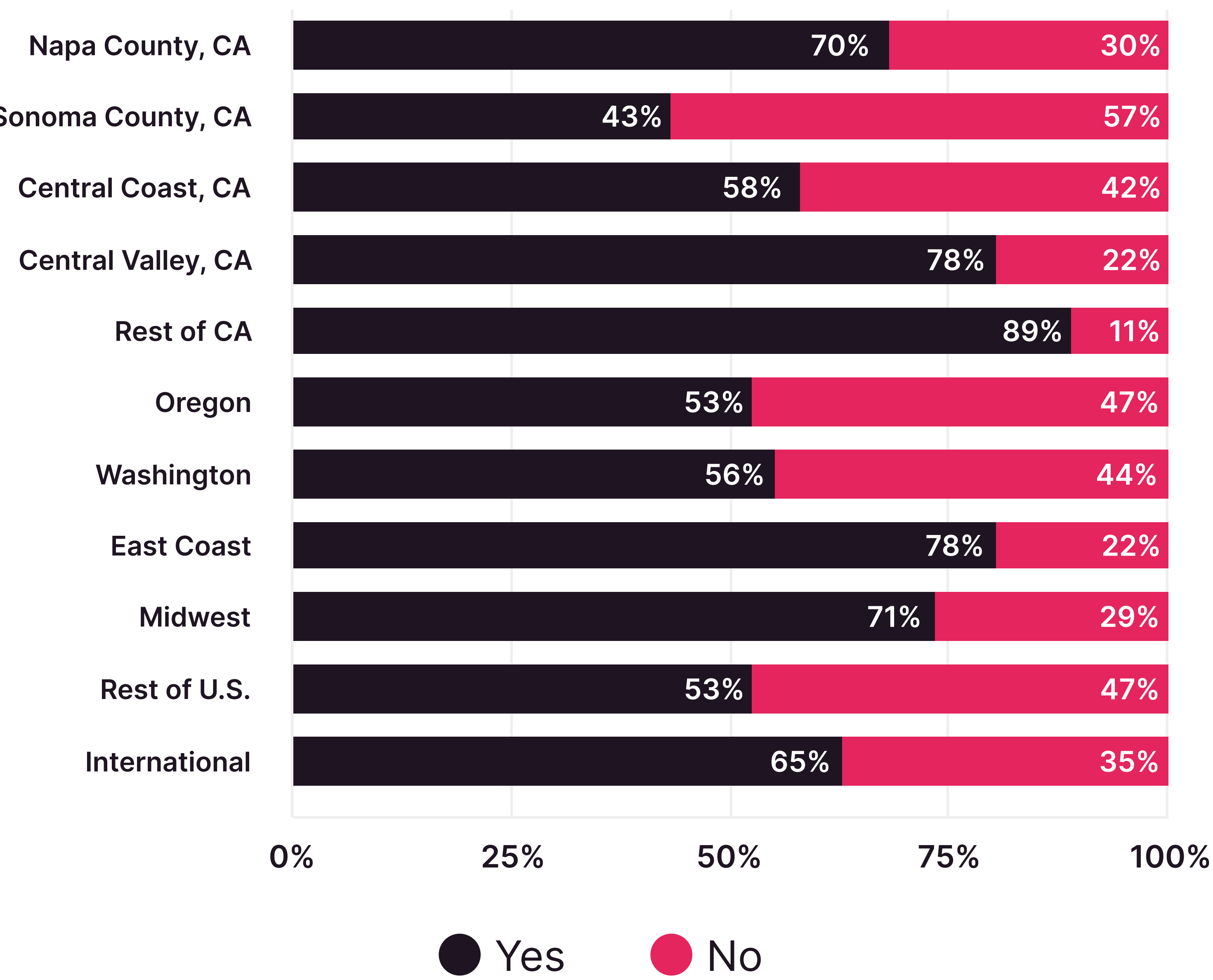


## % Profitable Wineries by Production Range



Size doesn't guarantee success, but it does improve the odds. The likelihood of profitability rises sharply with production volume. Larger wineries benefit from economies of scale and the ability to iterate on their products quickly. But small wineries have the benefit of a greater percentage of DTC sales, which support better margins and a strong path to profitability.

## % Profitable Wineries by Region



Being profitable or not also varies by region. Healthy wineries can be found everywhere, but profitability is more sensitive to market pressures and local economics. Rest of California (89%), East Coast (78%), Central Valley (78%) reported having the highest likelihood of profitability. While Sonoma County (43%) has the lowest likelihood of profitability, where more wineries reported negative cash flow than positive.



# What It Takes to Be a Profitable Winery

**What actually *drives* profitability in a winery? And more importantly, what *predicts* it?**

We analyzed responses from wineries that consistently turn a profit, and the data revealed a distinct set of shared practices. These aren't just habits of high-performing wineries; they're statistically linked to profitability outcomes.

Not all healthy wineries are profitable, and not all profitable ones are the most successful or the biggest. **But if profitability is your goal, these are the five practices to prioritize.**

## 1. Know – *and Protect* – Your Margins

Profitable wineries understand their numbers and act on them. They don't guess at pricing or overlook COGS.

## 2. Run an Operationally Disciplined Ship

Profitable wineries are more likely to rate their operations as strong and to adopt systems that reduce waste, errors, and rework.

## 3. Use Technology to Create Leverage

The most profitable wineries embrace modern tools to streamline everything from production to compliance to inventory. They don't see tech as a cost center, but rather a margin multiplier when applied intentionally.

## 4. Build a Resilient Team Culture

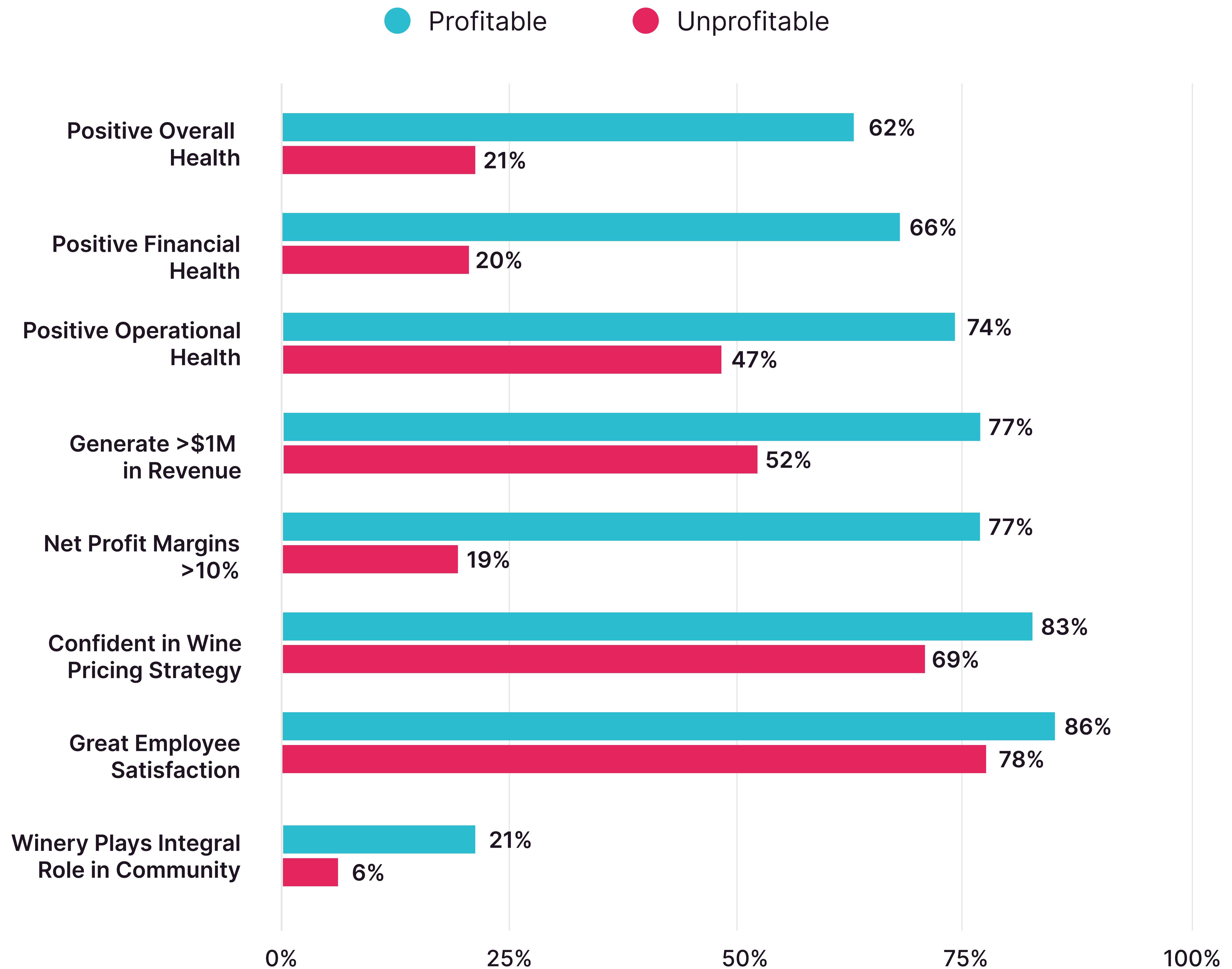
Happy, engaged teams are not just a cultural asset; they're a financial one. The data is clear: winery employees who are satisfied in their jobs are overwhelmingly more likely to work at profitable businesses.

## 5. Root Yourself in Community

Don't underestimate the ROI of showing up locally - or across regions - for your peers. Wineries embedded in their communities consistently outperform on the bottom line. In fact, wineries active in their communities were nearly 3X more likely to be profitable.



## Key Differences Between Wineries that are Profitable or Not



## What Truly Predicts Winery Profitability?

Our statistical analysis found that two factors stood out as the strongest predictors of profitability:

### 1. Net Profit Margins

Wineries with consistently low net margins were far less likely to be profitable. Margin discipline is the #1 indicator of sustained profitability. If you don't know your COGS and pricing thresholds, start there.

### 2. Community Engagement

Wineries that are active and integral to their community were nearly 3X more likely to be profitable. Community connections translate into loyal customers, stronger local support, and long-term resilience.

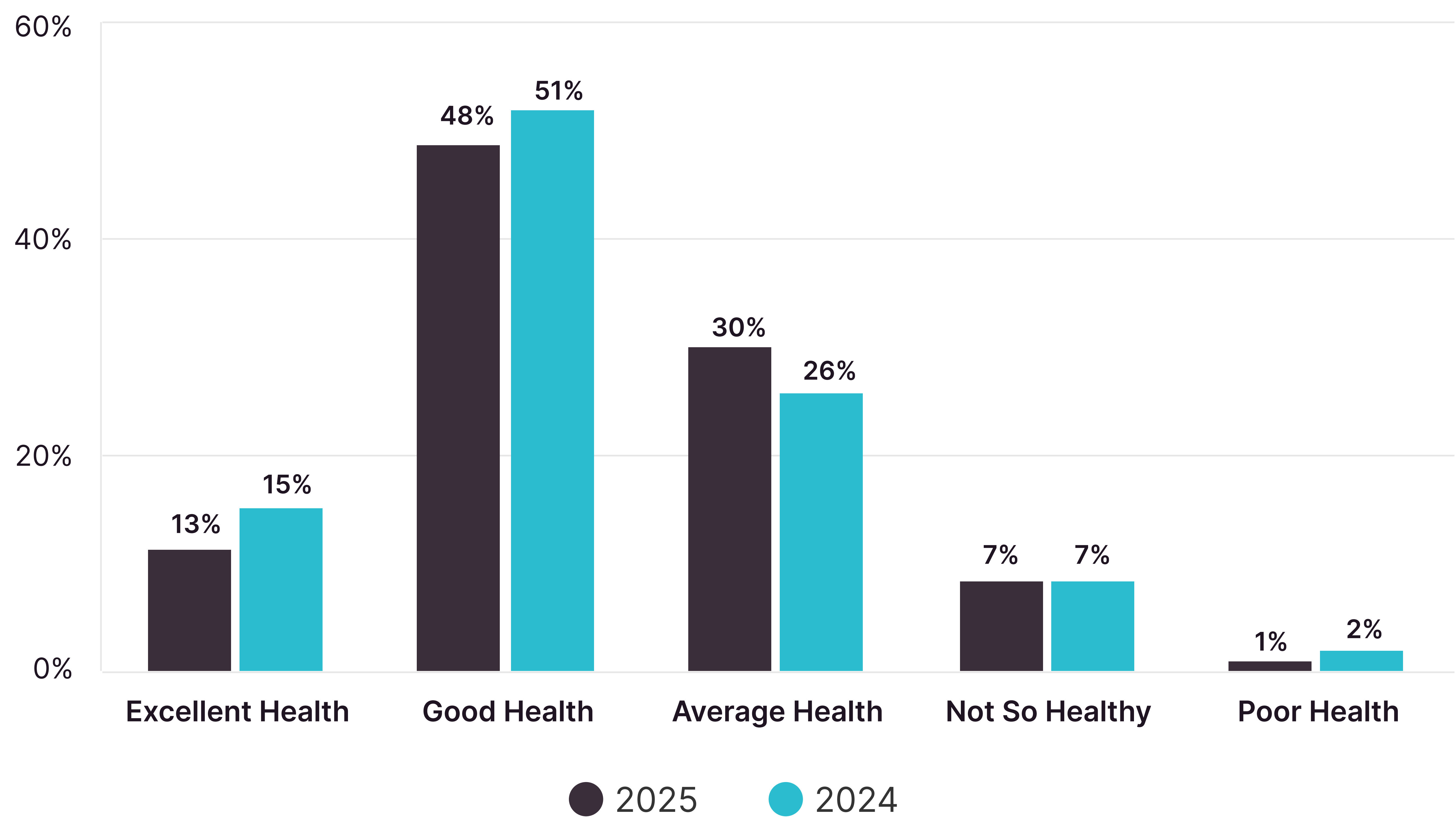


# Operational Health Trends & Insights





# How Would You Rate Your Winery’s Operational Health?



62% of winery professionals rated their operational health as "Great" or "Excellent," indicating a strong foundation in daily winery operations.

This figure is only slightly lower than the 66% who reported the same in 2024, suggesting that many wineries continue to perform well in core production and vineyard operations despite broader industry challenges.

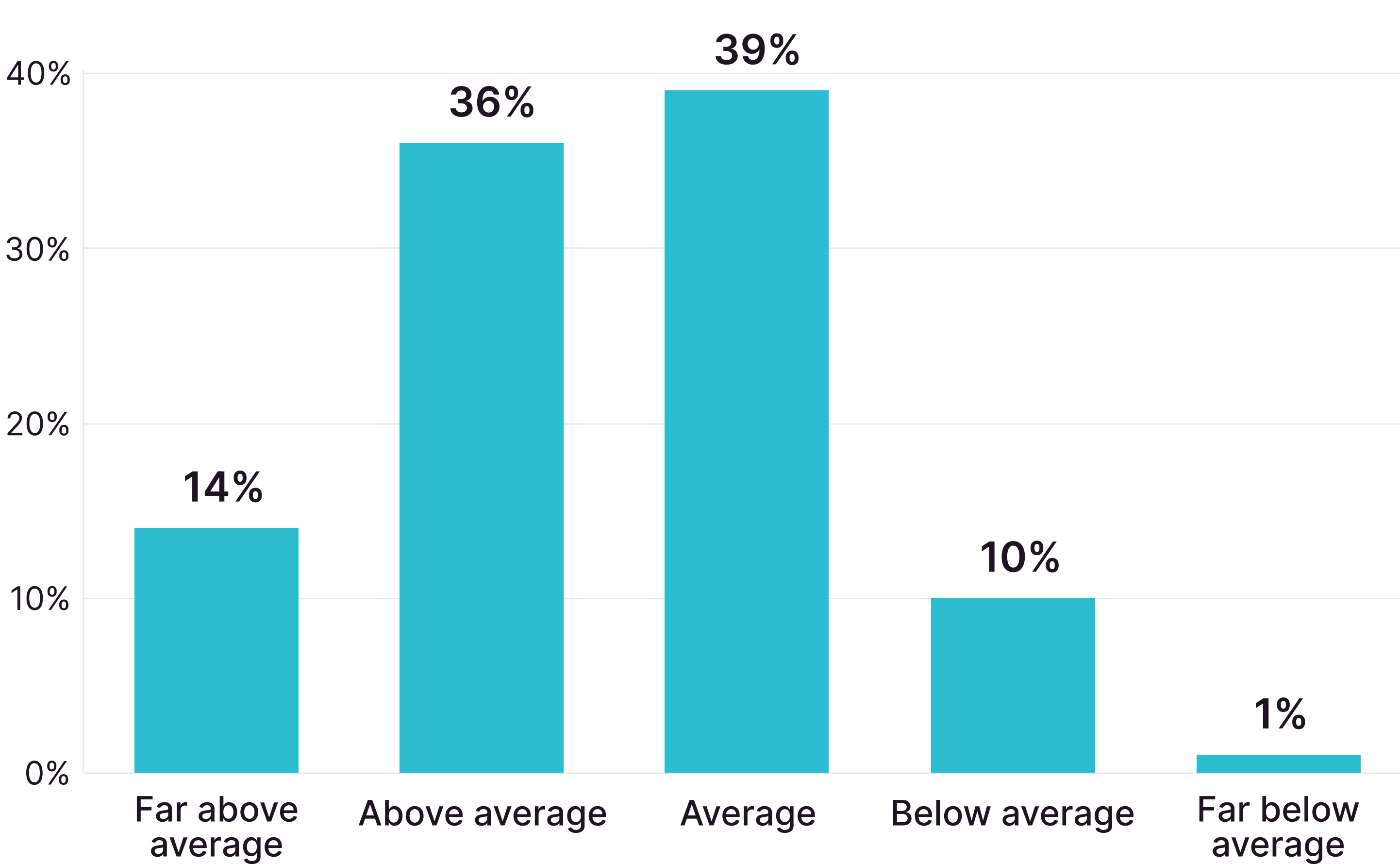
However, the feedback reveals a more complex situation. While production and farming are often regarded as "best-in-class," collaboration between departments remains a persistent challenge. Many also flagged underperformance in tasting room operations and sales, in addition to ongoing labor shortages straining operations.

- "Grade A for winery ops. Grade C for marketing and distribution"
- "Our operational costs have skyrocketed while our sales have dropped."
- "We need to upgrade equipment and facilities but do not have the resources to do that."
- "We struggle to find adequate, full-time labor, as well as seasonal labor, for our tasting room operation."



# Collaboration, Data, and Tech: The Building Blocks of Operational Health

How effectively does your winery work across departments compared to other wineries?

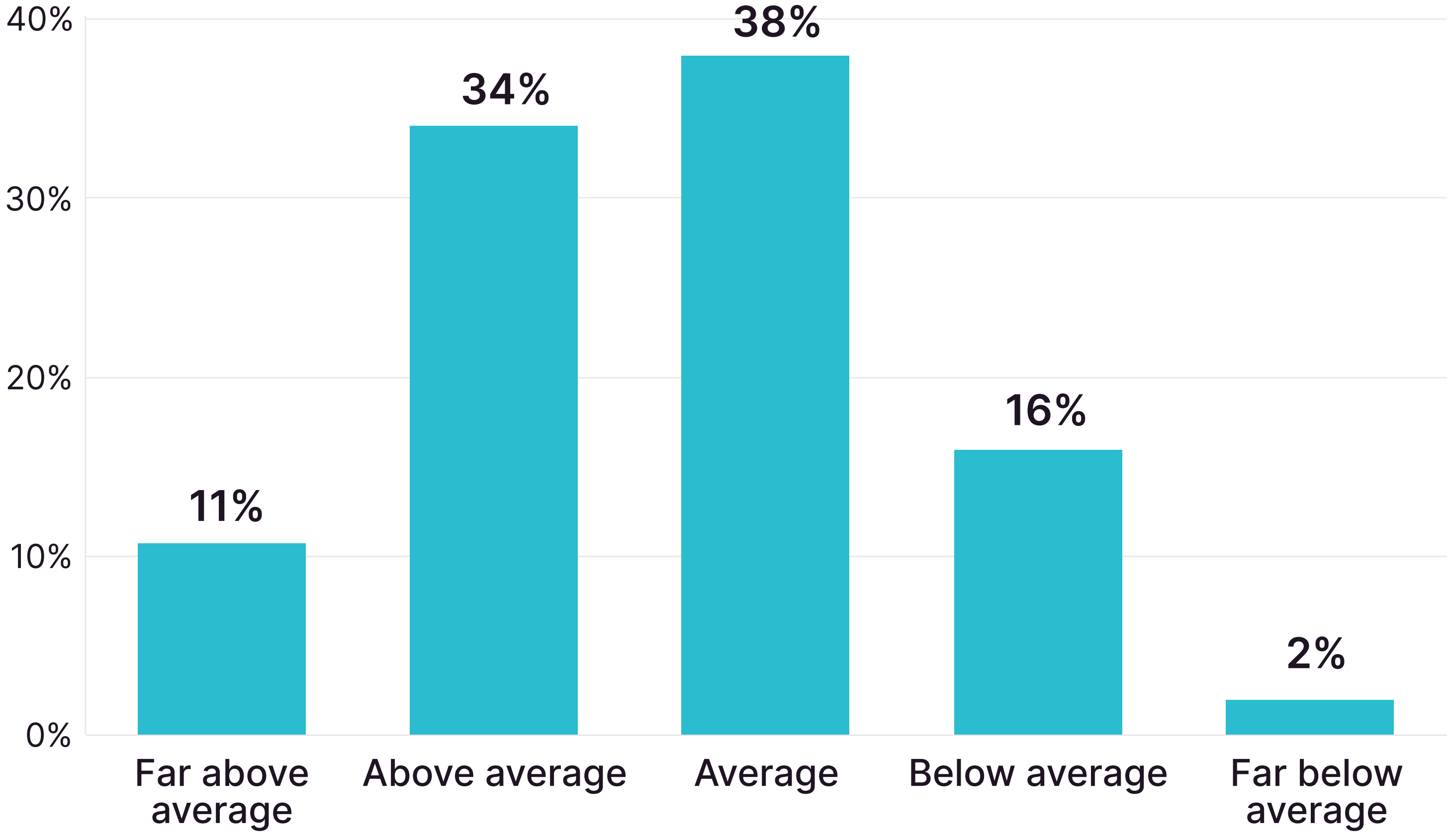


Smaller wineries excel in interdepartmental collaboration, with 68% of those producing fewer than 1,000 cases annually rating their collaboration above average. In contrast, only half of the wineries producing over 10,000 cases feel the same. This makes sense—smaller teams, fewer facilities, and less operational complexity make it easier to stay aligned. But as production grows, collaboration becomes more challenging.

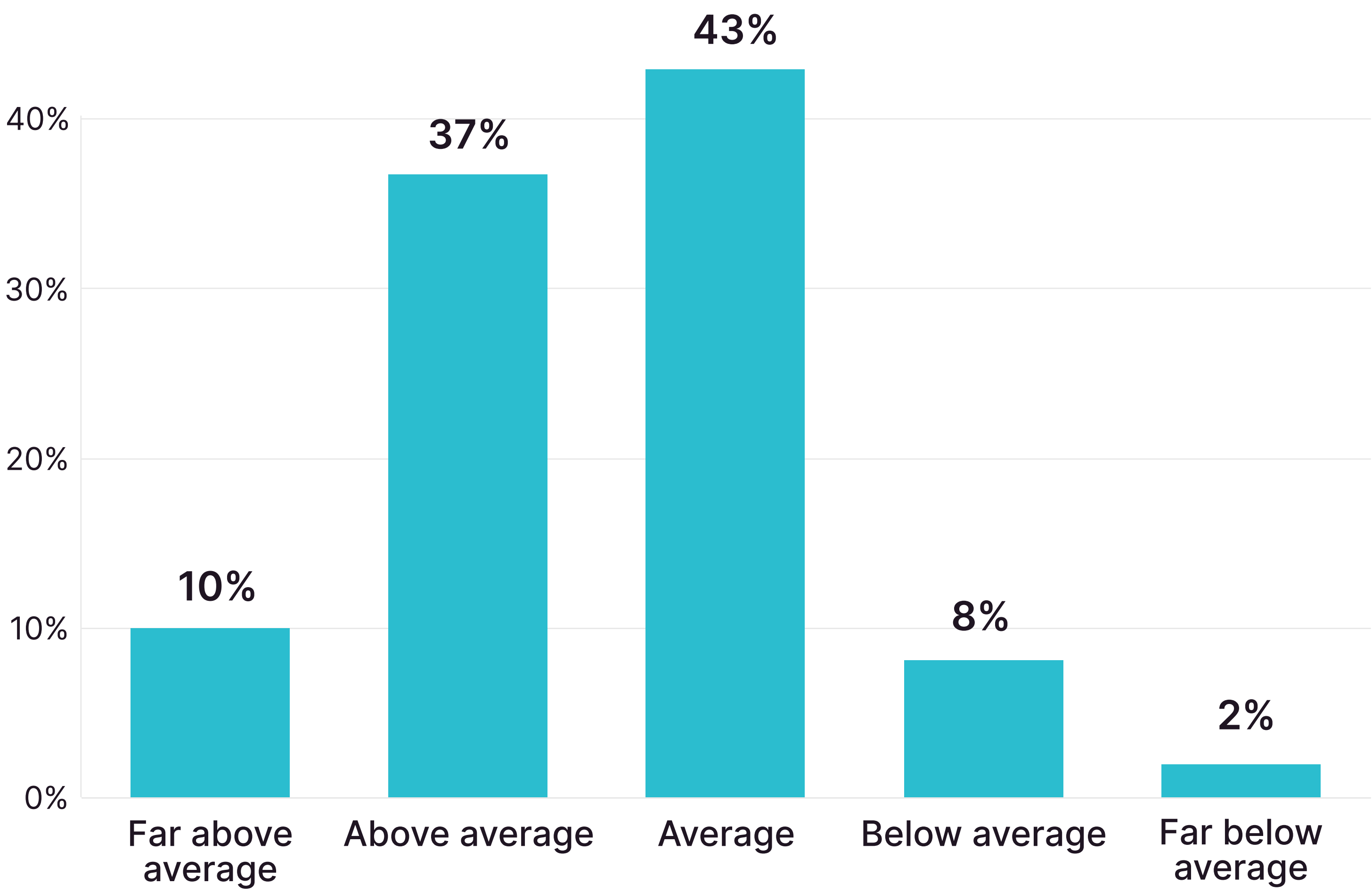
Perspectives on collaboration differ by role. While 66% of owners and executives see their winery as above average, frontline teams tell a different story. Only 40% of winemaking staff agree, and this group reported the highest percentage of below-average ratings, with 17% feeling their winery lags behind peers.

Data-driven decision-making shows a similar trend tied to size, with larger wineries leaning more on data. Over half of wineries producing over 25,000 cases view their data usage positively, compared to just 36% of those with 2,500 cases or fewer.

How data-driven do you believe your winery is compared to other wineries?



How would you rate your adoption and usage of technology compared to other wineries?



Technology adoption mirrors this, with two-thirds of wineries producing over 100,000 cases rating their tech usage positively, whereas only 44% of smaller wineries do. Additionally, 100% of finance teams feel the most confident about tech adoption, while less than half of winemaking staff share this sentiment, indicating a gap in technology use between departments.



# The Tech Advantage: How Modern Software Strengthens Winery Health

Technology adoption is no longer a “nice-to-have” for wineries - it’s a clear differentiator between those that thrive and those that struggle. Our data shows that wineries leveraging modern software consistently outperform their low-tech counterparts across nearly every measure of business health, from operational efficiency to employee satisfaction.



## They Have Healthier Operations

- 2x more likely to rate operations as strong (72% vs. 34%)
- Sales declines cut in half (17% vs 33%)



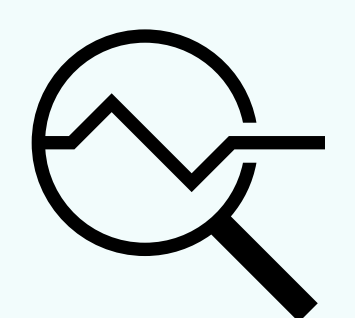
## They Have Happier Teams

- 3x lower turnover (11% vs 36%)
- 80% rate their company culture as Great (vs 51%)



## They Have Smarter Finances

- 5x more confident in pricing strategy (24% vs 5%)
- More COGS tracking (3% don't calculate vs 14%)



## They Are More Connected & Data Driven

- 95% use data confidently (vs 43% of low-tech adopting wineries)
- 3x more engaged with their communities (minimal involved drops from 53% to 19%)

## Modern software is essential

89% of wineries surveyed already use software to manage their operations - up from 84% in 2024. But many still rely on outdated systems, and that gap matters.

### Wineries that lag in adopting modern tools report:

- Difficulty accessing real-time data
- Employees become frustrated and unhappy having to use inefficient, outdated systems
- This leads to higher turnover and lower job satisfaction
- Lower confidence in financial decisions



# The Standout Solution: InnoVint

Among modern winery management systems, [InnoVint](#) stands out as the most comprehensive and intuitive platform for wineries of all sizes. By centralizing production, inventory, and financial data in one place, InnoVint helps wineries:

- ➔ Gain real-time visibility into operations
- ➔ Improve collaboration between production, sales, and finance
- ➔ Make data-backed decisions on pricing, forecasting, and COGS
- ➔ Build a stronger, more transparent culture
- ➔ Reduce costly errors and free up time for what matters most — making great wine

InnoVint's all-in-one winery operating system removes the complexity of running a winery, so your team can focus on what matters most — making exceptional wine and growing a sustainable, healthy business.

*According to the survey data, wineries are more likely to be profitable if they use InnoVint.*



"We used to have a winemaking coordinator whose task was to enter data for us, but that role has been eliminated, and we save over \$75,000 a year."

**Pauline Lhote**

*Director of Winemaking, CHANDON*



"Before InnoVint SUPPLY, inventory management would take 10+ hours each month. Now it takes only one!"

**Larry Harris**

*Owner, Bayernmoor Cellars*

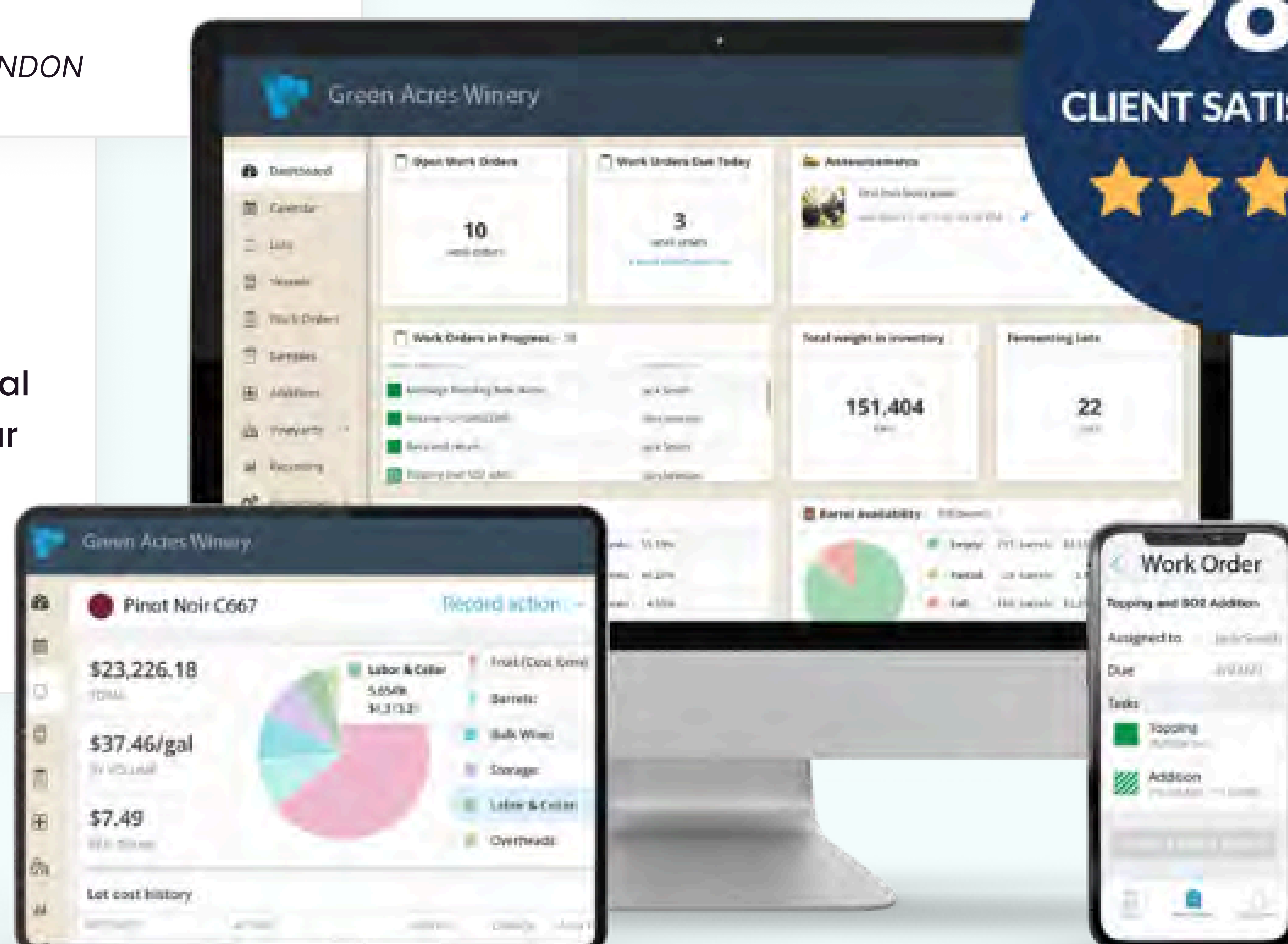


"We looked at other platforms, but InnoVint stood out. It could be molded to fit our specific operational needs, and its compatibility with our ERP system sealed the deal."

**Lisa Kaplan**

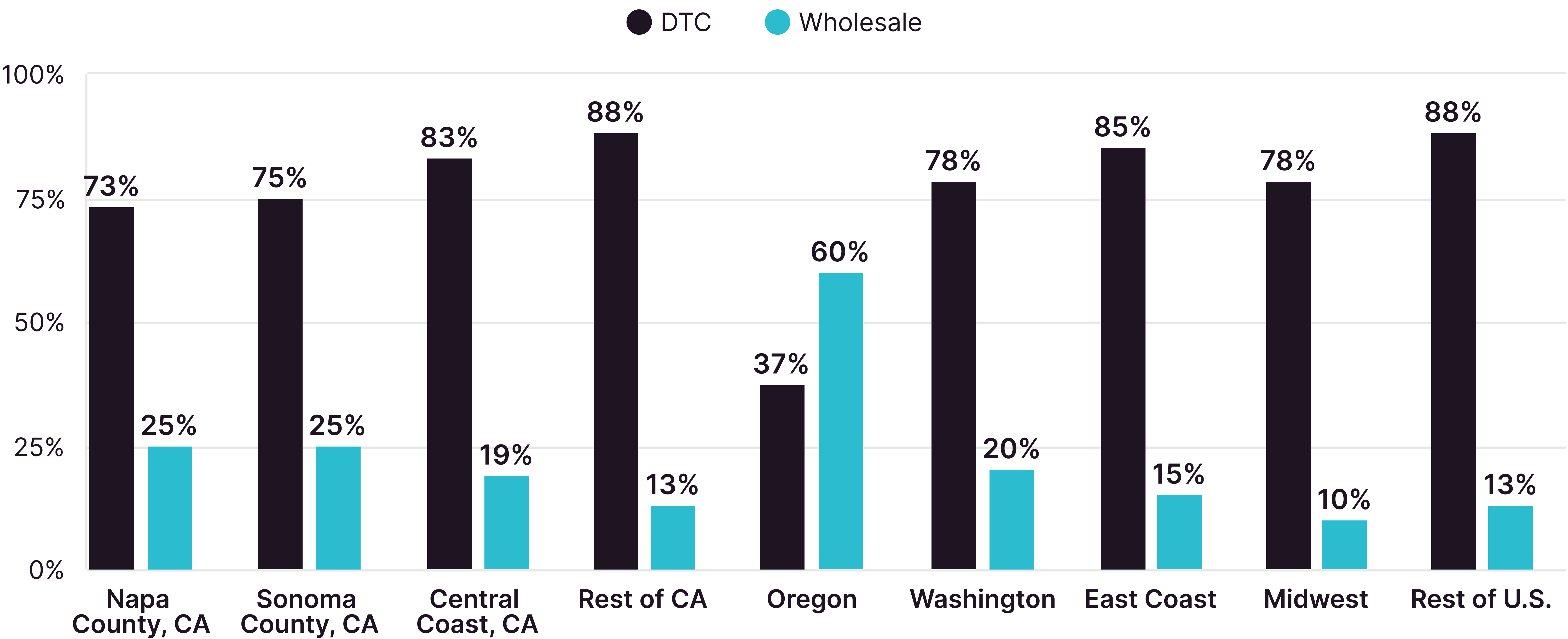
*VP of Sales Operations, House of Smith*

**98%**  
CLIENT SATISFACTION

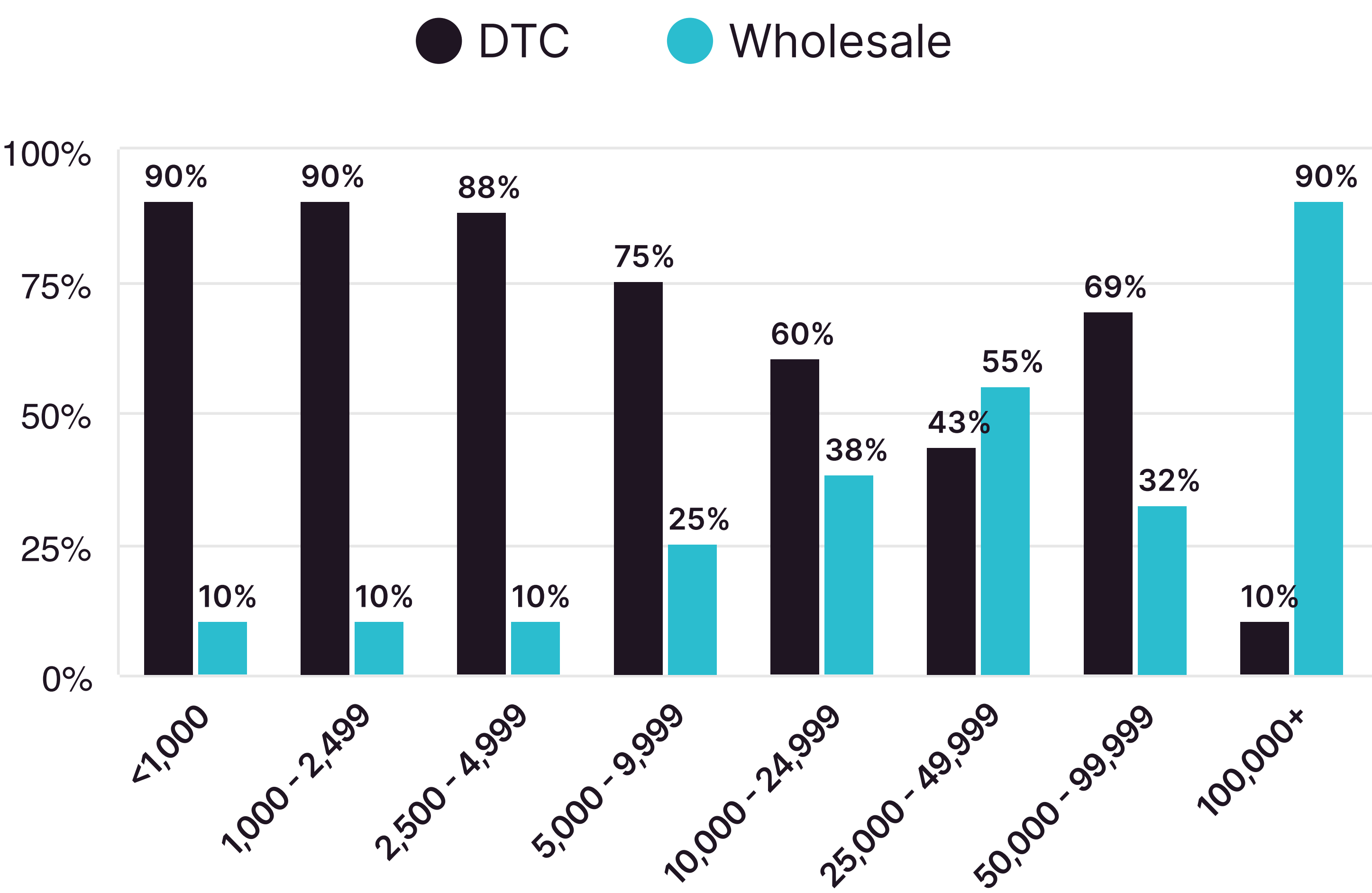




# Breakdown of Direct-to-Consumer vs. Wholesale



## DTC and Wholesale % by Production Volume



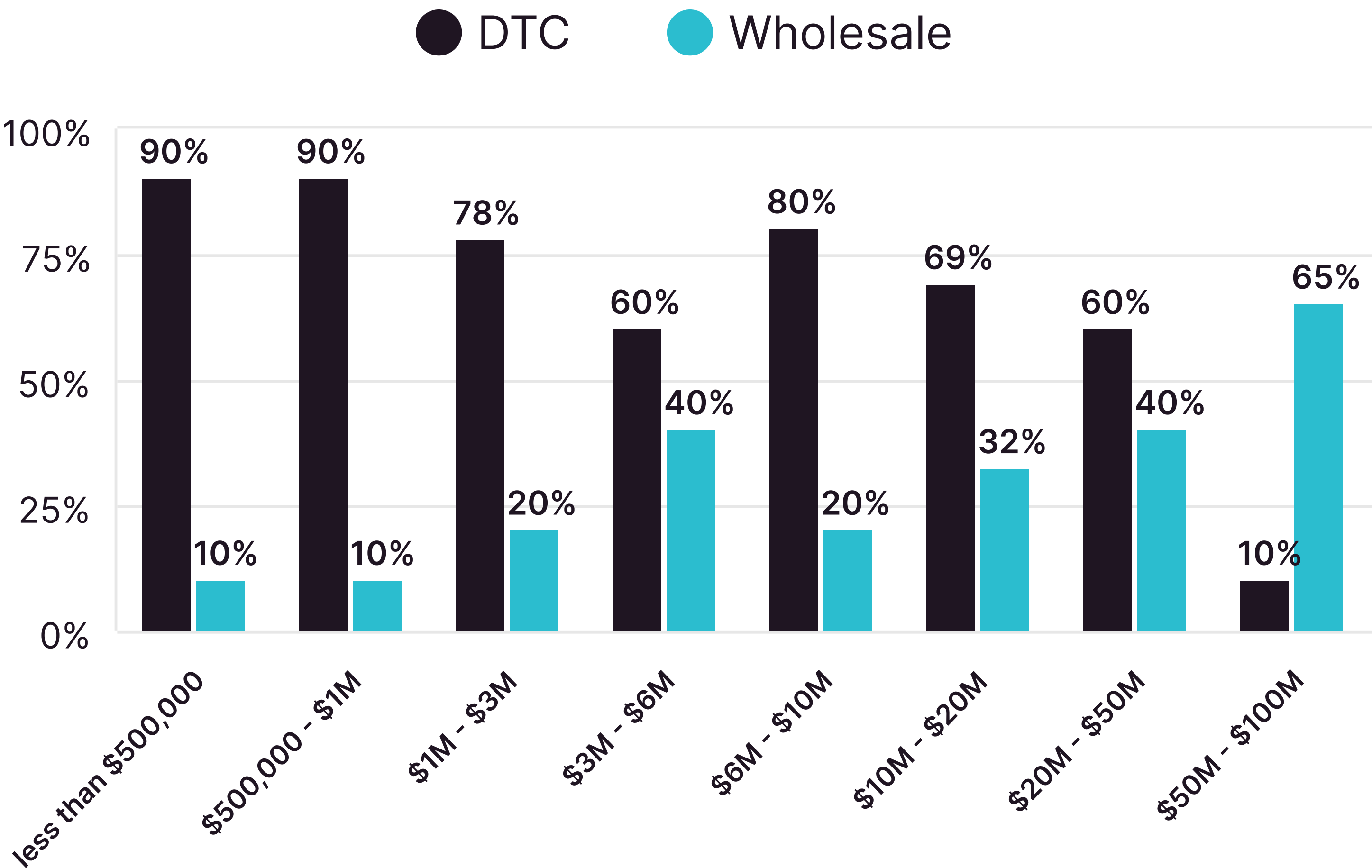
Smaller wineries primarily rely on direct-to-consumer sales. As their production increases, wholesale dependence rises.

Smaller wineries maximize higher-margin DTC sales, while larger producers trade margin for volume in wholesale markets.

The most mature markets — Napa, Sonoma, Oregon, and Washington — have the highest median percentage of wholesale sales.

Most regions rely heavily on DTC sales. Oregon is the outlier with a wholesale-heavy model and median sales of only 37% DTC. Emerging regions (midwest, east coast, and other parts of the US) lean more heavily DTC than others. This is likely due to loyal local customer bases, smaller scale operations, and less reliance on the 3-tier distribution network.

## DTC and Wholesale % by Annual Revenue





# Beyond Efficiency: Operations Shape the Whole Winery

When we asked winery professionals to rate their operational health, we expected to see links to productivity and workflow. But the data revealed something bigger. Strong operations don't just make things run smoother; they improve culture, retention, and even how the winery shows up in the community.

## The Operational Ripple Effect

Our analysis shows that operational health acts as a multiplier for success in every part of the business:

### 1. Stronger Internal Alignment

92% of staff at operationally healthy wineries understand their company's mission and goals, versus only 58% at unhealthy wineries. Operationally healthy wineries are also 3x more collaborative across departments.

### 2. Happier Teams

90% of satisfied employees worked at wineries with excellent operational health, while only 41% worked at less healthy ones.

### 3. Lower Turnover

92% of operationally healthy wineries reported very little staff turnover, while nearly 40% of unhealthy wineries struggle with retention.

### 4. Sales Trending Up

65% of wineries with excellent operational health said sales were trending up, compared to just 21% of less operationally healthy wineries. 50% of wineries with poor operations reported declining sales.

### 5. More Confident in Pricing

84% of wineries with excellent operations were confident in their pricing strategy, versus only 48% of those struggling operationally.

### 6. Ahead on Tech Adoption

73% of operationally healthy wineries are above average in adopting technology, 3x higher than less healthy wineries.

### 7. Stronger Community Presence

Wineries with healthy operations are also more connected externally, with 79% active in their communities, compared to 44% of less healthy ones.

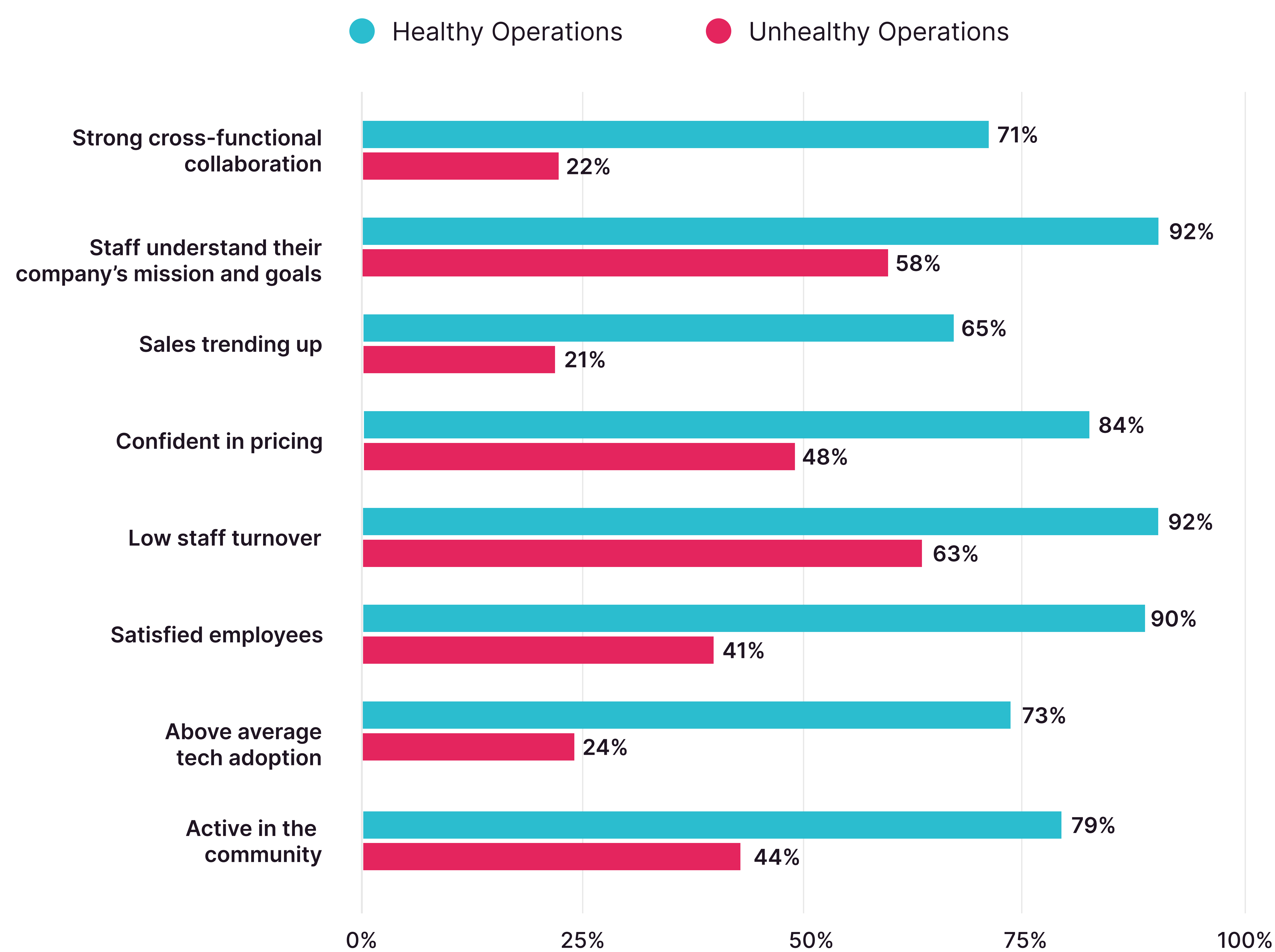


# Strengthen Operations with Small, Strategic Wins

Improving operational health doesn't always mean a full system overhaul. Many wineries see meaningful gains by focusing on:

- Documenting and sharing clear workflows so everyone knows the “how” and “why” of their work.
- Centralizing critical data (inventory, production, sales) to make better decisions faster.
- Reviewing processes that drain time and identifying where tech can save hours each week.

When operations are clear and streamlined, teams spend less time firefighting and more time driving the business forward.



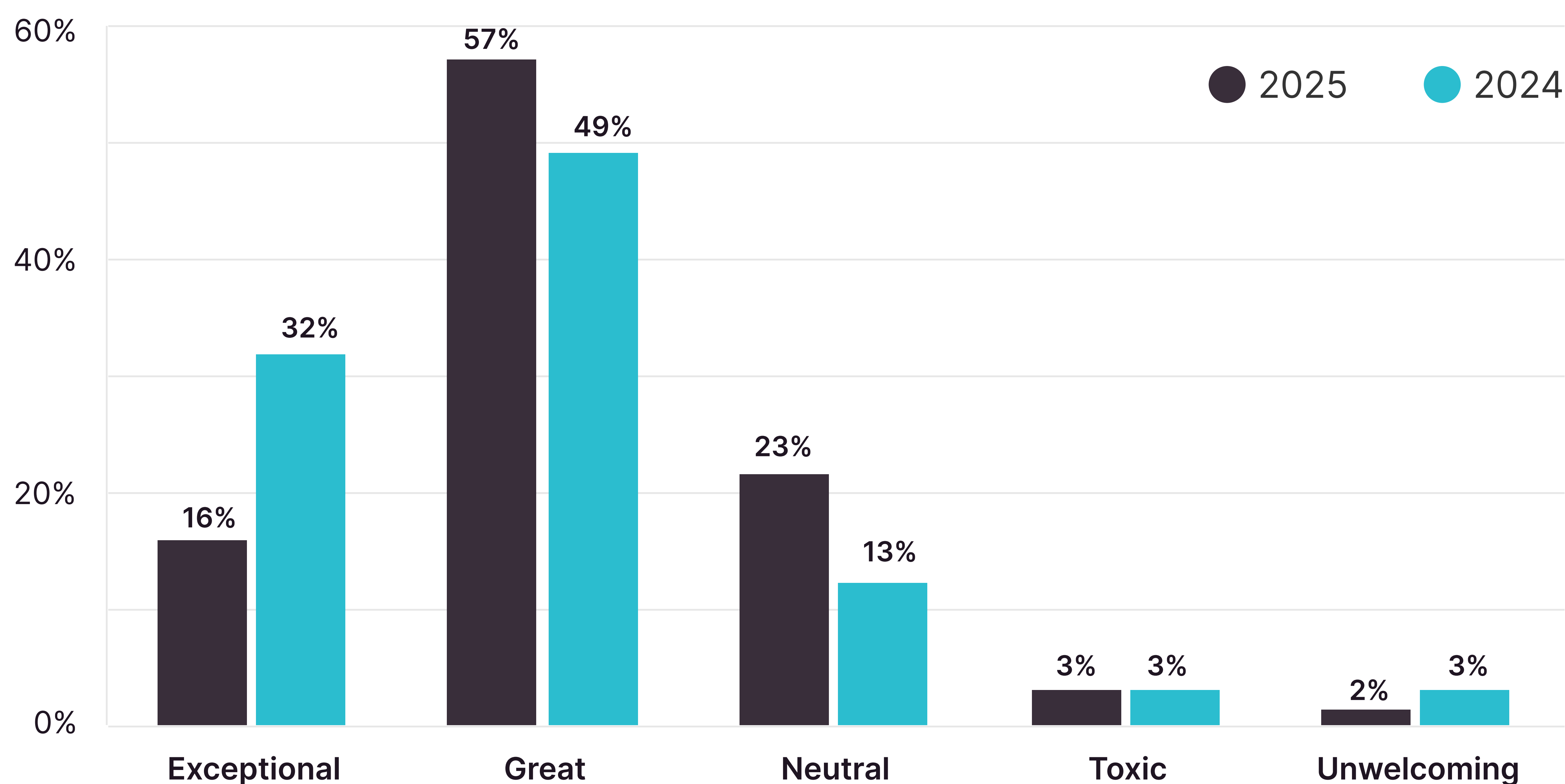


# Cultural Health Trends & Insights





# How Would You Rate Your Winery’s Cultural Health?



**73% of winery professionals rate their company's cultural health as Great or Exceptional, down from 81% in 2024.**

Survey respondents highlighted key factors that shape the cultural health of wineries. A major takeaway is that alignment of team goals and shared purpose fosters a thriving work culture. Employees who understand their roles feel more engaged, while those who rated their winery’s culture poorly cited mismatched expectations, poor communication, and lack of collaboration as major issues.

Teamwork and camaraderie emerged as positive themes, with many describing their teams as cohesive and supportive across wineries of all sizes. However, there are areas for improvement, particularly in leadership. Participants noted that some leaders seemed disconnected and communicated ineffectively, indicating a need for better leadership to cultivate a more inclusive and engaged culture in the industry.

“Communication feels poor, goals seem misaligned, expectations are not made clear.”

“Leadership is disconnected from the rest of the team.”

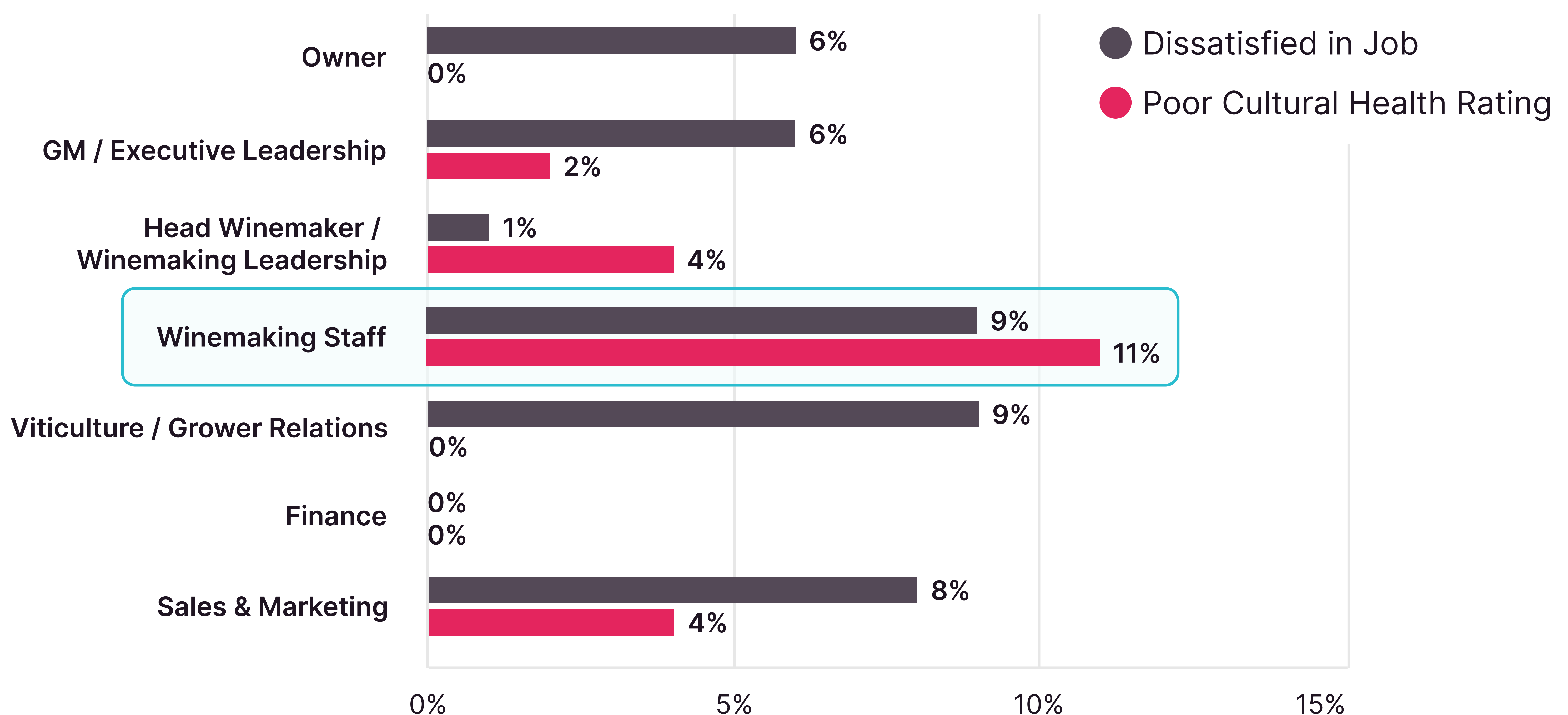
“Some people do not understand how they fit into the entire team.”

“Our employees are friends with each other and have strong personal bonds, which results in very low employee turnover.”

“We have a small, close-knit team with excellent communication, including between departments. Everyone wears multiple hats and works hard.”



# Job Satisfaction and Culture: A Role-by-Role Look



## Not everyone experiences winery culture the same way.

Leadership and back-office teams — like owners, executives, and finance — are the most satisfied and positive about their workplace culture. Nearly 90% of owners and executives rate culture as Exceptional or Great, and more than 80% say they're satisfied in their roles.

But the picture looks different for frontline roles. **Winemaking staff have the lowest cultural ratings, with just 58% describing their workplace positively and 11% calling it toxic, the highest of any group.** Sales and marketing teams show the lowest job satisfaction, with only 63% satisfied and 8% dissatisfied.

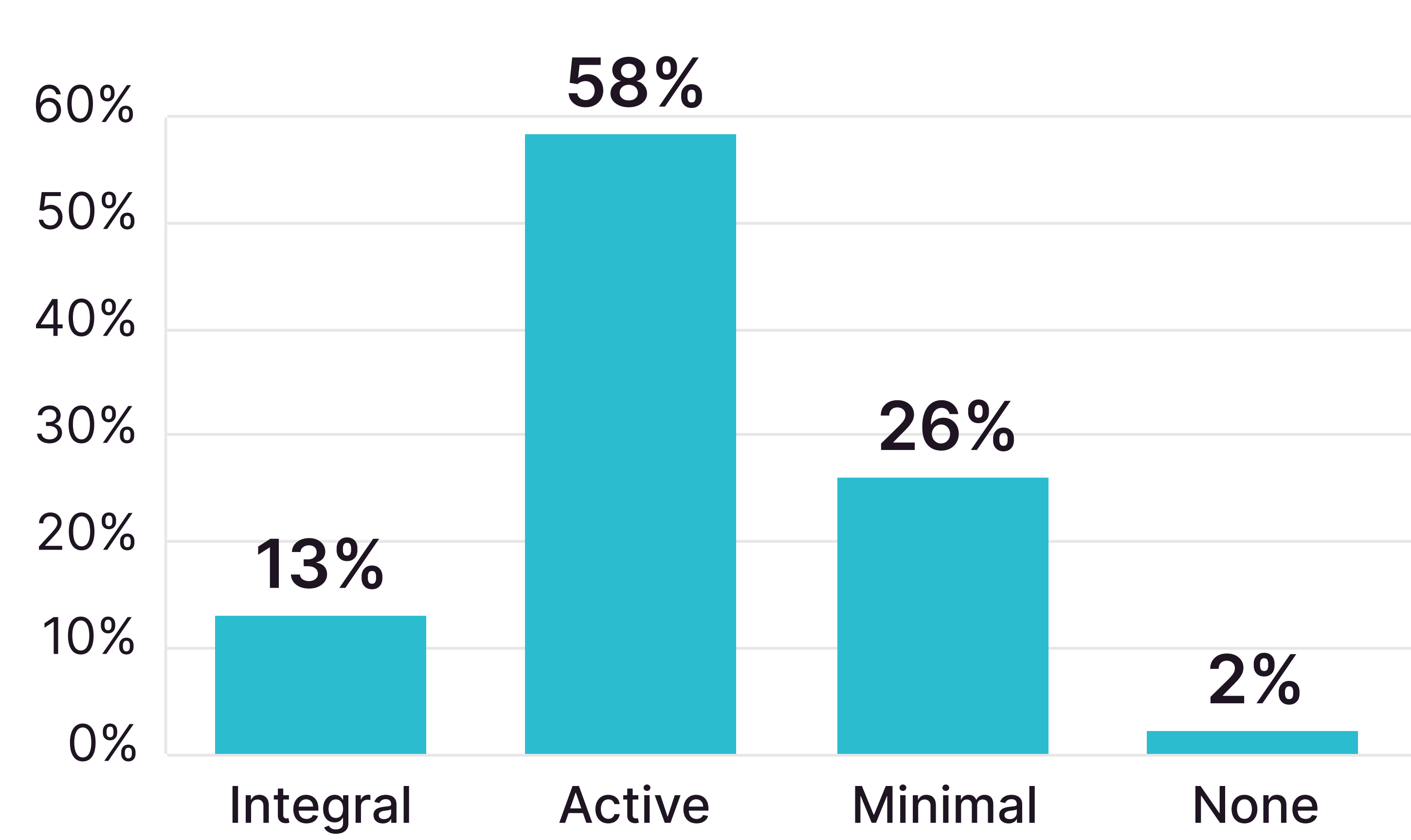
These gaps suggest that while culture may feel strong from the top, pressure points emerge in roles closest to production challenges and sales performance.



# How community-centric are wineries and winery professionals?

We asked survey respondents to rate both their own, as well as their winery's, involvement in the community.

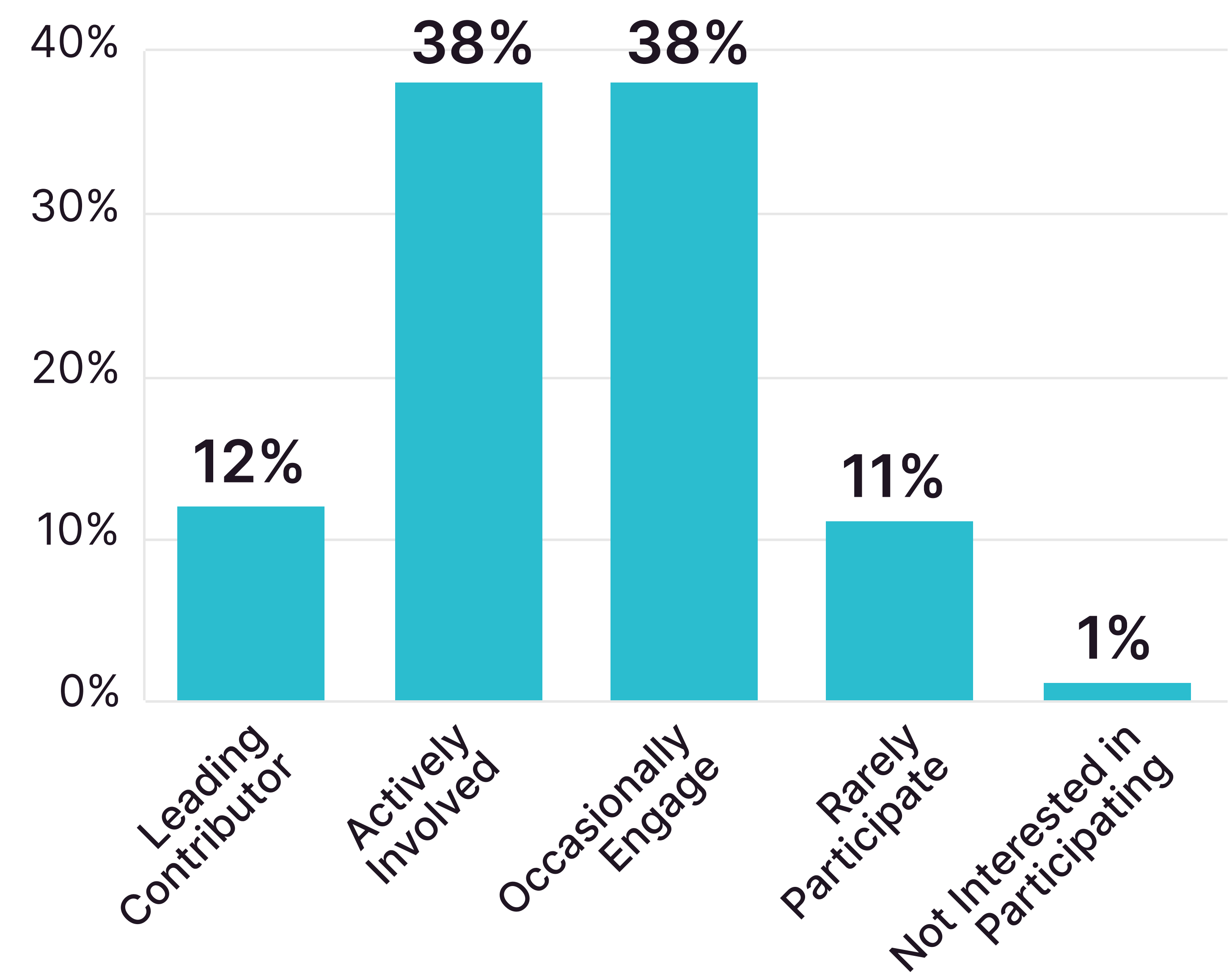
How would you rate your winery's overall involvement in the community?



Employees at smaller wineries were more likely to report higher levels of personal involvement in the wine industry. For many smaller, newly established wineries, connecting with other wine businesses in similar situations proves invaluable for knowledge sharing and collective learning.

Owners and General Managers reported the highest personal involvement in the wine industry. Winemaking staff and finance professionals are the least personally involved.

How would you rate your own involvement in the community?



Interestingly, wineries in Napa and Sonoma reported significantly lower community involvement compared to smaller, emerging wine regions. With fewer institutional resources and less global recognition, professionals in these areas often feel a stronger sense of ownership in building their region's reputation.



# Defining the Impact of Community Involvement

At its core, a community-centric winery understands that its success is tied to the health of the broader industry and community. These wineries — and winery professionals — actively contribute to and engage with the networks that surround it.

By staying connected and giving back, it builds resilience, earns trust, and creates long-term value for its business, its team, and its region.

**And the data shows the meaningful impact to the bottom line. Wineries involved in the community are:**



**3x more likely to be profitable.**



**3x more likely to report increasing sales.**

**Engaged wineries are healthier wineries.** When you invest in your community, you're also investing in your team, your network, and the future of the industry.

## So, How Do Wineries Stay Connected to Their Industry & Communities?

When asked how they engage beyond their own winery, respondents shared a wide range of involvement.

### Regional & National Wine Associations

The most common way wineries stay active is through their regional associations like Vintners or Winegrowers Associations. Most AVAs, if not broader region, will have at least one to join. There are also national associations and lobbyists like The Wine Institute and Family Winegrowers' Association.

### Events & Educational Programs

Speaking at or attending industry events like the largest national trade show Unified Wine & Grape Symposium, a state-hosted Wine Industry Symposium, Women in Wine Organization, are all great ways to stay involved. There are often local technical groups as well where producers can learn from one another.

### Peer-to-Peer & Informal Networks

Joining informal happy hours and meetups, LinkedIn groups, and The Punchdown digital community, where folks share best practices, troubleshoot winemaking issues, and collaborate in other ways organically.

### Community Engagement Beyond Wine

Some wineries extend their reach beyond the wine industry, contributing to the broader community by supporting local schools, youth sports, Chambers of Commerce, and nonprofits.



# It's Not Just Vibes: Culture Impacts the Bottom Line

When we asked winery professionals how they'd rate their company culture, we knew it would reveal something about employee experience. But the data shows that culture goes far beyond morale – it's tightly connected to how well the business performs.

## The Cultural Ripple Effect

This year's benchmark analysis uncovered strong correlations between cultural health and a range of operational and financial outcomes.

### 1. Stronger Operations

Wineries with excellent operations rated their culture as "exceptional" or "great" 94% of the time. On the flip side, 71% of those with poor operations called their culture "toxic."

### 2. Higher Technology Adoption

Among wineries that rated themselves far above average in tech adoption, 88% also rated their culture positively, compared to just 47% among those behind the curve.

### 3. More Data-Driven

Data maturity matters—88% of data-forward wineries rated their culture positively vs. 56% of those below industry average.

### 4. Better Sales Performance

Wineries with upward-trending sales were much more likely to report a healthy culture (82% vs. 63% among those with declining sales).

### 5. Greater Pricing Confidence

Culture was robust among wineries who were confident in their pricing strategy — 93% of that group also reported great culture.

## Strengthen Culture Through Better Communication

Improving cultural health doesn't have to mean a massive shift in company values. In many cases, it's about better communication:

- Share goals across departments so everyone understands the bigger picture.
- Make financial data more accessible to build trust and inclusion.
- Connect the dots to profitability by showing how each role impacts the business.

When people are informed and aligned, they're more engaged, more empowered, and the business runs better because of it.



# Final Thoughts

So, what do you *actually* do with all of this data?

Reports like this only matter if they lead to action. That's why we're wrapping up with a few practical steps any winery can take to move the needle on business health. Whether you're a small family-run operation or part of a larger team, these ideas are designed to help you apply the insights from this report in a real and meaningful way.

## 1. Start with what's in your control

Whether you're focused on winemaking, finance, or sales, you don't need a full business overhaul to make progress. Pick one area where you can make a difference. That might be running a quick cost analysis, improving your inventory visibility, or starting a conversation about how your team collaborates. **Small changes often create the biggest momentum.**

## 2. Benchmark internally

How does your winery compare to what you've read here? Are your margins in a healthy range? Is your team aligned on priorities? Are you using tools that support better decisions? Use this report as a conversation starter. Bring the data to your next planning meeting or team huddle.

**Highlight one or two areas where your winery is doing well, and one area you want to improve.**

## 3. Choose one priority for next quarter

Don't try to tackle everything at once. Set a simple, clear focus for the next three months based on what you've learned. Maybe it's updating your pricing strategy, adopting new technology, or simply gathering feedback from your team.

**Choose one goal, write it down, and revisit it at the end of the quarter.**





# The 5 Tenets of a Healthy Wine Business

With the healthy wine business framework wineries gain valuable insights into where they are strong and where they need improvement. [Get the full framework →](#)

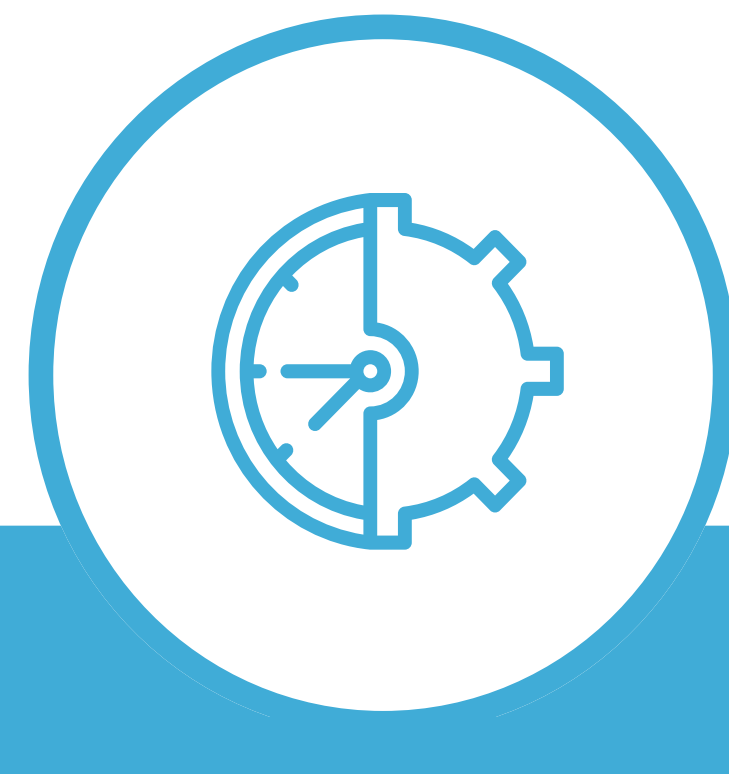


## Profitable

- Do you have a financial model, budget, and strategy with clear goals?
- Do you track financial performance, and know industry benchmarks for a winery at your size and scale?
- Do you understand your profitability per product?
- Are you sure you have enough cash to get through any unexpected turbulence?

### Quick Tips

- Put cost accounting best practices in place.
- Use technology efficiently to ensure you have an accurate view of your net sales for each product sold and you properly track costs of goods sold (COGS) for each of your products.
- Plan for long-term financial sustainability.



## Operational Excellence

- Are you more likely to embrace change or resist it?
- Do you have systems in place that simplify operational complexity?
- Can you improve processes to decrease bottlenecks and cost?
- Can you easily recall the production details of any wine released to market in the last seven years?

### Quick Tips

- Seek ways to improve processes; eliminate operational bottlenecks and redundancy.
- Ensure every department is represented on your leadership team for strong cross-functional collaboration.
- Enforce sustainable business practices for positive impact on long-term sustainability.



## Relies on Data

- What data are you collecting, and how do you share it across teams to drive decision-making?
- Are you using the best technology in each segment of your business?
- Are the decisions about which products to make based on data?
- What are the key data points that tell you whether you are successful?

### Quick Tips

- Empower your team with the right tools and technology, from vineyard to production to sales to finance.
- Identify and consistently measure yourself against benchmarks, specifically against other wineries of your size and scale.



## Builds a Positive Work Culture

- Are you authentic and transparent about what you value?
- How are you recognizing and rewarding your top talent?
- Are you meeting with your team often to ensure they're happy and motivated?
- Does the business have a strong vision and plan for success?

### Quick Tips

- Define your values and set clear goals.
- Conduct your business with integrity, transparency and a commitment to ethical practices.
- Provide your team with the best tools, resources, and opportunities to learn new skills and advance in their careers.



## Community-Centric

- Are you regularly sharing lessons learned with other wineries?
- How wide is your network? Do you intentionally seek new perspectives?
- How often do you share your experiences to help others, both positive and negative?
- In what ways are you modifying your business plan to account for your target market's preferences?

### Quick Tips

- Get involved in the community by volunteering, sharing your story, mentoring, joining organizations.
- Build relationships with other wineries outside of your region to gain new perspectives on how others operate.



# The only online space built just for the wine industry

Join 1000+ winery professionals learning how to run better wineries and make better wine.

Join The Punchdown →



## Connection

- Engage in discussion channels and reach new industry experts.
- Grow your professional network.
- Learn about virtual and in-person events near you.



## Growth

- Explore professional development through downloadable tools, structured courses, and video recordings.
- Learn how others are solving similar problems.
- View Expert Talks, and other resources added monthly.



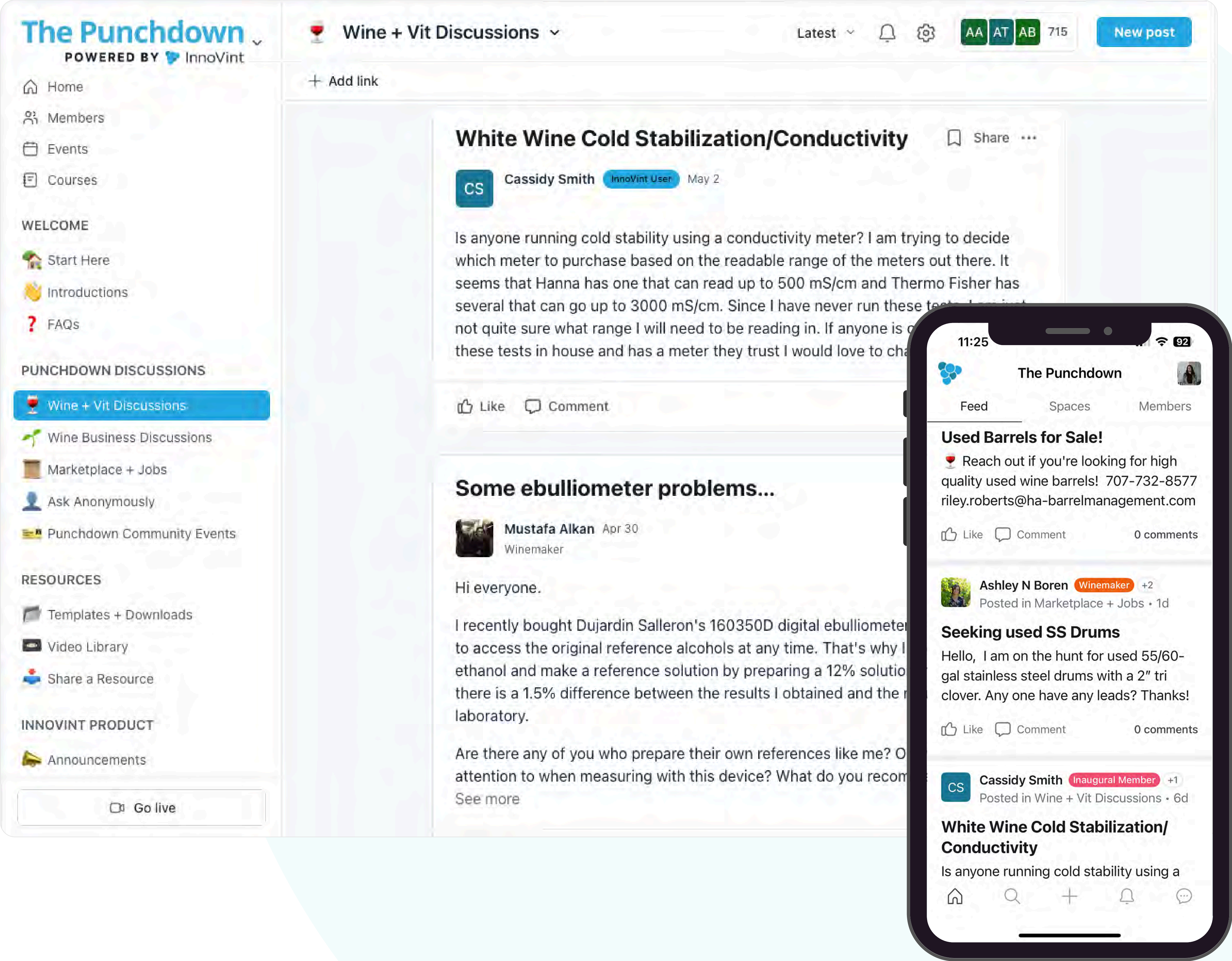
## Exchange

- Buy, sell, and trade your winemaking materials.
- Hire top talent and find new opportunities in the industry.



## Product

- Talk to other InnoVint users in a dedicated channel.
- Contribute to InnoVint's research and development.
- Be the first to know about new product releases.







# A Healthier Winery Begins Here

From the moment the buds break in the vineyard to the departure of your finished product from your winery, InnoVint is by your side.

Schedule a bit of time with our experienced team and we'll explore how to amp up your operations and overall winery health!

Talk To InnoVint →



innovint.us