

CENTRAL COAST IQ

Wine Country Intelligence Report

Santa Barbara County Wine Industry
Digital Performance Benchmark

Q1 2026 Edition | 150 Wineries Evaluated

1.1 million visitors. \$117 million in tourism spending. How visible is your winery to the customers already searching for you?

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Executive Summary

Why This Report Exists

I live in this valley. I drink this wine. I know many of the people behind these labels, and I want every one of them to succeed. Santa Barbara County's wine industry generates \$1.7 billion in annual economic activity and draws 1.1 million visitors a year [1]. Those visitors sustain tasting rooms, restaurants, hotels, and the families that depend on them. This report exists because I believe the best way to help is to tell the truth about where things stand.

My hope is straightforward: by improving digital visibility across the valley, we can attract more visitors to the area, more of those visitors will buy wine here, and more of them will ask for it back in their home markets. A rising tide lifts all boats. This report is designed to show every winery in the county exactly where they stand and what they can do about it.

The Honest Reality

The COVID years were a gift that many of us mistook for a trend. Tasting rooms were full. Wine clubs swelled. DTC revenue surged. But those conditions were artificial, and they're not coming back. National wine sales declined 2% by volume in 2025, the third consecutive year of decline [2]. Tasting room visits fell 5.1% nationally in 2024. Tasting fees have more than doubled industry-wide since 2012, with Napa reserve tastings now averaging \$128. Santa Barbara County remains far more accessible, most tastings here run \$20-\$35, but that makes every visitor count even more.

Younger consumers drink less frequently and show lower baseline preference for wine over spirits and ready-to-drink alternatives. The Silicon Valley Bank 2026 State of the Wine Industry report [2] is blunt: wineries that treat DTC as a loyalty engine, not just a sales channel, are the ones surviving. The rest are losing club members.

This isn't meant to alarm anyone. It's meant to sharpen our focus. The wineries in this valley make extraordinary wine. But making great wine has never been enough on its own, it takes people finding you, choosing you, and coming back. And the way that happens has fundamentally changed.

The Age of AI Discovery

Here's the shift that most wineries haven't reckoned with yet: a growing number of visitors are planning their wine country trips by asking AI, ChatGPT, Claude, Perplexity, instead of searching Google. They type "I'm going to Santa Ynez this weekend, where should I taste?" and follow whatever the AI recommends. This isn't a niche behavior anymore. It's accelerating, and it changes everything about how you need to show up online.

The typical Santa Ynez Valley visitor is 45-65, earns \$100K+, and eighty percent are day-trippers from California's major metros, Los Angeles, Santa Barbara, San Francisco, and San Diego [3]. A Los Angeles

visitor spends roughly \$233 per trip. They're making decisions about where to taste before they leave the house, checking Google reviews, scanning Instagram, reading TripAdvisor, and increasingly asking AI chatbots for recommendations. The question isn't whether your wine is good. It's whether anyone can find you.

Why This Rubric

We built this measurement system because “you should improve your digital presence” isn't actionable advice. Every winery knows they should be doing better online, but better at what? Which of the hundred things you could do actually moves the needle? This rubric is our answer.

We chose six scoring dimensions because they map directly to the signals that real visitors actually use when deciding where to taste. We deliberately did not score winemaking quality, critical acclaim, vineyard acreage, or tasting room aesthetics, because those aren't what drive a first-time visitor's decision. A tourist searching Google Maps for “winery near me” sees your review count and rating. A pre-planner on Instagram sees whether your feed looks alive or abandoned. An AI chatbot recommends wineries with rich, public content. Every dimension in this rubric measures something a winery can actually control and improve.

The six dimensions are: Online Visibility (22 pts), can people find you through Google, AI assistants, and Maps? Review Authority (22 pts), do your reviews build trust and attract new visitors? Brand Consistency (11 pts), does your digital identity match across every platform? Web Presence Quality (20 pts), when visitors reach your site, does it convert interest into action? Social Signals (10 pts), does your social media confirm you're open, active, and worth visiting? Direct Commerce (15 pts), can someone who loved their tasting actually buy your wine afterward?

How We Collect the Data

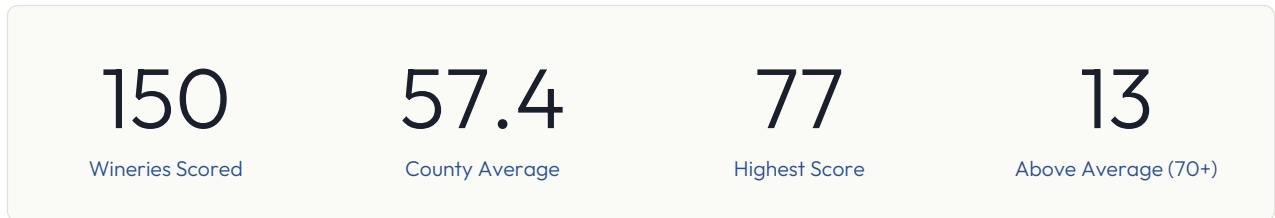
Every data point comes from publicly accessible sources, the same places your potential visitors look. No surveys. No self-reporting. No access to your private analytics. We pull Google reviews, Yelp and TripAdvisor profiles, Instagram activity, website performance, schema markup, Wine-Searcher listings, Vivino profiles, and AI chatbot responses. We run 12 real trip-planning prompts across the ChatGPT, Claude, Perplexity, and Gemini panel every month, generating 48 responses and tracking which wineries get recommended. Your score reflects what a potential customer actually encounters when searching for, evaluating, or trying to buy from your winery online.

What Your Score Means for Your Business

This isn't an academic exercise. Every point in this rubric corresponds to a real visitor behavior: searching, evaluating, choosing, purchasing. A winery scoring 75 isn't just “above average” in an abstract sense, it means visitors can find you, your reviews inspire confidence, your website converts, and your commerce is accessible. A winery scoring 42 has real, quantifiable gaps that are costing them tasting room visits and DTC revenue every single day.

The encouraging part: 56 of these 100 points are things you can fix yourself , many in a single focused week. Brand consistency, web presence, social presence, direct commerce setup. The other 44 points, review authority and online visibility, AI presence, require sustained strategy and patience, but they compound over time. This rubric isn't a judgment. It's a roadmap.

This report scores every active winery in Santa Barbara County on the signals that determine whether a visitor walks through your door or drives past it.



Score Distribution



Performance by Town

Visitors navigate by town, not by AVA. Most wineries in the county source grapes from multiple appellations across the region, so the AVA on a bottle rarely matches the road a visitor takes to taste it. A couple driving up from LA is choosing between an afternoon in Los Olivos, a walk through Solvang, or a Lompoc Wine Ghetto crawl. Here's how each tasting hub performs.

Town	Wineries	Avg Score	Top Score
Solvang	19	59.5	73
Los Olivos	36	59.4	77
Santa Maria	8	59.3	74
Santa Ynez	14	58.8	69
Buellton	15	56.9	71
Santa Barbara	23	55.8	67
Lompoc	24	54.8	74
Los Alamos	7	50.9	64

Who's Coming and Why They Choose You

The typical Santa Ynez Valley visitor is 45–65 years old, earns \$100K+, and drives in from Los Angeles, Santa Barbara, or San Diego. Eighty percent are day-trippers who spend an average of \$233 per visit. They come for the wine, the food, and the experience, in that order. They are not studying AVA maps. They want a great afternoon with some education thrown in.

Research from the Angelsmith consumer survey of 1,200+ affluent wine consumers [4] confirms that visitors choose a region first, then prioritize the type of experience offered, ranking experience above wine varietals and above price. The disqualifiers? Poor online reviews and a lack of interesting experiences. Thirty-four percent of consumers said limited or uninteresting tasting options were enough to skip a winery entirely.

An emerging segment is younger solo travelers and Gen Z visitors drawn to destinations that blend adventure, wellness, and individual experiences. The SVB 2026 report [2] is direct: if tasting experiences remain static, return visits decline. The wineries adapting, offering seasonal events, food pairings, and behind-the-scenes access, are the ones retaining and growing their club memberships.

How They Find You

The scoring rubric is built around the actual decision-making journey of these visitors. There are three distinct paths to your tasting room, each with different digital signals that matter.

The Pre-Planner

This person does most of their work before they leave home. They search Google for “best wineries in Santa Barbara” or “Los Olivos wine tasting weekend,” read travel blogs, and cross-reference TripAdvisor reviews. TripAdvisor is often a starting point even when someone ultimately books elsewhere, they use it to compare, get a read on the vibe, and decide whether the experience fits a group or couple. Instagram validates the shortlist, more than six in ten wine tasting consumers look at a winery’s social media when planning a trip. These visitors often show up with three to four stops already decided.

What matters: Content and credibility, travel blog coverage, strong TripAdvisor presence, and an Instagram feed that signals “this is what you’re walking into.” A winery not appearing on curated lists, or appearing with thin information, loses these visitors before the trip is booked.

The Hotel-Guided Visitor

The overnigher who arrives without a complete plan and relies on hotel concierge or tour operators to fill the itinerary. This is a significant channel in the valley, and likely the one most correlated with higher-spend profiles. Local drivers, concierges, and private tour operators have genuine influence, their recommendations routinely surface wineries visitors would never have found independently. These gatekeepers build itineraries from personal relationships and firsthand experience, which means they're effectively making winery selection decisions for a meaningful slice of visitors.

What matters: Relationships. If the hotel concierges and tour operators in your area don't have a reason to mention you, you're invisible to this visitor.

The Spontaneous Visitor

Arrives in town, pulls out their phone, types "wine tasting Los Olivos" into Google Maps. This is where your Google Business Profile and reviews are the entire game. These are often day-trippers or people who had wine country on the agenda but didn't plan the specifics. The winery that shows up at the top of the map pack with 200 reviews and a 4.6 rating wins. The one with 28 reviews and no photos loses before anyone clicks through.

What matters: Google Maps presence, review volume, photo library, and rating. Location is the #1 selection factor, visitors decide on the region first, then search within it. If you don't surface in the top three map results for your corridor, you're not in the consideration set.

Once They're In-Region

Santa Barbara Vintners and Visit SYV provide nine wine trails and curated route maps that function as default itineraries for visitors who want structure without hiring a guide. Being on a trail doesn't guarantee traffic, but not being well-represented on one is a quiet loss. Word of mouth compounds in-trip, a visitor who has a great experience asks the tasting room staff where else to go, generating two or three downstream referrals that bypass every digital channel entirely.

Scoring Methodology

Every winery is evaluated using six dimensions that map directly to the visitor journey described above. All data is collected from publicly accessible sources, no surveys, no self-reporting, no private analytics access. Scores reflect what a potential customer actually encounters when searching for, evaluating, or trying to buy from your winery online.

Dimension	What We Measure & Why	Max	County Avg	% of Max
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Online Visibility	How findable is your winery across every channel visitors use? Website reachability, schema markup, Google listing strength, blog/content, GBP photos, Google organic search results, and AI Visibility (5 pts), whether ChatGPT, Claude, and Perplexity recommend your winery when tourists ask for trip-planning advice. AI-powered discovery is a separate channel from SEO and growing fast.	22	12.7	58%
Review Authority	The pre-planner’s starting point. Google reviews with recency (11 pts), Yelp claimed status and volume (4 pts), TripAdvisor presence and recency (5 pts), and sentiment quality from review text (2 pts).	22	10.0	45%
Brand Consistency	Does your digital identity match across platforms? GBP category optimization, secondary categories, verified listing, NAP consistency, and brand cleanliness.	11	7.3	66%
Web Presence Quality	What does a visitor find when they reach your site? Mobile experience (4 pts), wine club page (5 pts), online store depth (5 pts), content quality (4 pts), schema markup (2 pts).	20	13.9	70%
Social Signals	Instagram is how wine country visitors validate their shortlist. Follower count and posting frequency, weekly posting with 5,000+ followers sets the benchmark. A dormant account signals a disengaged business.	10	3.1	31%
Direct Commerce	Can a motivated visitor book, buy, join, and receive wine? Online reservation/booking (3 pts), tasting experience page quality (3 pts), online store depth (2 pts), wine club signup flow (3 pts), shipping clarity (3 pts), Vivino presence (1 pt).	15	10.4	69%

Score bands: 85–100 = Strong digital operator. 70–84 = Above average, a few fixable gaps. 55–69 = Mid-pack, real gaps costing DTC revenue. 40–54 = Below average, multiple fixable problems. Below 40 = Significant digital blind spot.

Top 10: Online Visibility (22 pts)

#	Winery	Score	Tasting Room
1	Juniper & Stone	20/22	Solvang
2	Chapter House Estate	19/22	Santa Maria
3	Redbarn Cellars	18/22	Los Olivos
4	Buena Tierra Estate	18/22	Los Olivos
5	Wren Hill Cellars	18/22	Lompoc
6	Seven Bells Estate	18/22	Los Olivos
7	Iron Bluff Estate	18/22	Los Olivos
8	Xanthe Hill Cellars	18/22	Santa Barbara
9	La Junta Vineyards	17/22	Los Olivos
10	Windrose Vineyards	17/22	Los Olivos

Top 10: Review Authority (22 pts)

#	Winery	Score	Tasting Room
1	Redbarn Cellars	19/22	Los Olivos
2	La Junta Vineyards	19/22	Los Olivos
3	Whitford Family Cellars	19/22	Santa Maria
4	Open Range Cellars	19/22	Buellton
5	Heron's Reach Cellars	18/22	Solvang
6	Buena Tierra Estate	17/22	Los Olivos
7	Magpie Vineyards	17/22	Santa Ynez
8	Mira Loma Vineyards	17/22	Solvang
9	Tradewind Cellars	17/22	Santa Ynez
10	Seven Bells Estate	16/22	Los Olivos

Top 10: Brand Consistency (11 pts)

#	Winery	Score	Tasting Room
1	Redbarn Cellars	8/11	Los Olivos
2	Buena Tierra Estate	8/11	Los Olivos
3	La Junta Vineyards	8/11	Los Olivos
4	Saltbrook Cellars	8/11	Los Olivos
5	Chapter House Estate	8/11	Santa Maria
6	Wren Hill Cellars	8/11	Lompoc
7	Juniper & Stone	8/11	Solvang
8	Whitford Family Cellars	8/11	Santa Maria
9	Seven Bells Estate	8/11	Los Olivos
10	Windrose Vineyards	8/11	Los Olivos

Top 10: Web Presence Quality (20 pts)

#	Winery	Score	Tasting Room
1	Saltbrook Cellars	17/20	Los Olivos
2	Juniper & Stone	17/20	Solvang
3	Sabatino Family Estate	17/20	Los Olivos
4	Holloway Vineyards	17/20	Buellton
5	Tallow Hill Vineyards	17/20	Los Alamos
6	Nardini Family Wines	17/20	Los Olivos
7	Embers Estate	17/20	Lompoc
8	Mariner Estate	17/20	Santa Ynez
9	Redbarn Cellars	16/20	Los Olivos
10	Buena Tierra Estate	16/20	Los Olivos

Top 10: Social Signals (10 pts)

#	Winery	Score	Tasting Room
1	Tallow Hill Vineyards	7/10	Los Alamos
2	Hollander Estate	6/10	Santa Barbara
3	Buena Tierra Estate	5/10	Los Olivos
4	Saltbrook Cellars	5/10	Los Olivos
5	Magpie Vineyards	5/10	Santa Ynez
6	Upper Field Cellars	5/10	Santa Ynez
7	Stone Pine Cellars	5/10	Santa Barbara
8	Hawkstone Vineyards	5/10	Santa Maria
9	Falcon Run Vineyards	4/10	Santa Ynez
10	Quintain Estate	4/10	Los Olivos

Top 10: Direct Commerce (15 pts)

#	Winery	Score	Tasting Room
1	Saltbrook Cellars	14/15	Los Olivos
2	Wren Hill Cellars	14/15	Lompoc
3	Whitford Family Cellars	14/15	Santa Maria
4	Windrose Vineyards	14/15	Los Olivos
5	Coyote Bend Vineyards	14/15	Solvang
6	Ashton Family Vineyards	14/15	Gaviota
7	Magnolia Bend Vineyards	14/15	Lompoc
8	Quintain Estate	14/15	Los Olivos
9	Boundary Oak Estate	14/15	Lompoc
10	Foxhollow Estate	14/15	Santa Barbara

Where to Start: Dimensions Ranked by Effort

Not every point in the rubric takes the same effort to earn. Some dimensions are one-time fixes you can knock out in an afternoon. Others require sustained strategy and patience. We rank them here so you know where the quick wins are and where the longer investments pay off.

Fix Once, Brand Consistency (11 pts)

This is an attention-to-detail dimension. Claim your Google Business Profile. Set your primary category to “Winery.” Add secondary categories. Make sure your phone number and address match everywhere. As of the April 2026 rubric, phone mismatches between your website and your Yelp listing are scored directly

(-1 point per disagreement), and individual winery reports call out the specific mismatch. These are one-time fixes that take an afternoon and never need to be revisited. If you're losing points here, that's the easiest gap to close in the entire rubric.

☒ Build Once, Web Presence Quality (20 pts)

Your website is a project, not a campaign. Make it mobile-friendly. Add a dedicated wine club page. Build out your online store with real product descriptions. Add schema markup so Google understands what your pages are. This is a one-time web development sprint, a few days of focused work, that pays dividends for years. Once built, maintenance is minimal.

☒ Set Up Once, Direct Commerce (15 pts)

Online booking through Tock, Resy, or your commerce platform. A clear tasting experience page with fees, hours, and what to expect. A wine club signup that works in two clicks. A shipping page with states listed. These are configuration tasks, not creative ones. Most wineries can close their Direct Commerce gaps in a single focused session.

☒☒ Ongoing, Simple, Social Signals (10 pts)

Post to Instagram once a week. That's it. No ad spend required, no strategy document, no content calendar. Show the vineyard, the tasting room, the people. Consistency matters more than polish. A dormant account is worse than an imperfect one, visitors use Instagram to confirm a winery is open and active.

☒☒ Ongoing, Requires Patience, Review Authority (22 pts)

You cannot buy reviews and you cannot rush them. Review authority is built by delivering a great tasting room experience and then asking guests to share it. Google reviews are the foundation. TripAdvisor matters for trip planners. Yelp matters for local credibility. This dimension rewards consistency over months, not a single push. The good news: once you have 100+ Google reviews with a 4.5 rating, the flywheel sustains itself.

☒☒☒ Most Strategic, Online Visibility (22 pts)

This is the hardest dimension to move and the one that separates the top performers from everyone else. It includes traditional SEO (blog content, search rankings, indexed pages) and the new AI Visibility component (whether ChatGPT, Claude, Perplexity, and Gemini Perplexity recommend you to tourists). SEO requires ongoing content investment. AI visibility requires building the kind of rich, distinctive, publicly accessible content that AI models surface when tourists ask for recommendations. There are no shortcuts here, but the wineries that invest in discoverability are the ones filling their tasting rooms with visitors who already want to be there.

AI Visibility: The New Discovery Channel

A growing number of tourists now plan their wine country trips by asking AI chatbots instead of searching Google. They type prompts like “I’m going to Santa Ynez this weekend, what should I do?” or “best wineries near Solvang for a group” into ChatGPT, Claude, Perplexity, or Google Gemini (including its AI Overview panel) and follow whatever the AI recommends.

This is fundamentally different from SEO. AI tools do not simply return a list of links, they synthesize reviews, press mentions, blog coverage, and web content into specific, named recommendations. A winery with perfect Google rankings can be completely absent from AI results. A winery with strong media coverage and review authority can surface in AI recommendations even with modest SEO. The signals are different, the channel is different, and the wineries winning here are not always the same ones winning in traditional search.

How we measure it

We run 12 real trip-planning prompts, the same questions tourists actually ask, across four major AI platforms (ChatGPT, Claude, Perplexity, and Google Gemini with live Search grounding), generating 48 total responses each month. Gemini's grounded responses approximate what a user sees in Google's AI Overview panel, the dominant AI surface for US search traffic. We scan every response for winery mentions and track which wineries each AI recommends, how consistently, and across which types of queries (weekend plans, best-of lists, romantic trips, budget tastings, dog-friendly, Pinot Noir specialists, and town-specific searches).

Results: 81 of 150 wineries were recommended by at least one AI platform. 69 wineries are completely AI-invisible, not recommended in any of 48 queries across ChatGPT, Claude, Perplexity, and Gemini.

Most AI-Visible Wineries

#	Winery	AI Mentions	Out of 48
1	Seven Bells Estate	29	60%
2	Xanthe Hill Cellars	26	54%
3	Chapter House Estate	24	50%
4	Juniper & Stone	18	38%
5	Iron Bluff Estate	18	38%
6	Trefry Family Vineyards	15	31%
7	Windrose Vineyards	15	31%
8	Tradewind Cellars	14	29%
9	Magpie Vineyards	12	25%

10	Galbraith Cellars	12	25%
11	Junction Hill Vineyards	11	23%
12	Buena Tierra Estate	10	21%
13	Tonelli Vineyards	10	21%
14	Redbarn Cellars	10	21%
15	Magnolia Bend Vineyards	10	21%

What drives AI recommendations? AI tools favor wineries with rich, public content: detailed tasting room descriptions, unique experiences (outdoor seating, picnic areas, dog-friendly policies), strong review presence across multiple platforms, press and blog coverage, and distinctive positioning (estate vineyard, specific varietal focus, notable winemaker). Generic web presence produces generic invisibility. The wineries that give AI something specific to say are the ones that get recommended.

Why this matters now: AI trip planning is not a future trend, it is happening today and accelerating. Early movers who build AI-visible content now are training these models to recommend them. As AI becomes the default trip-planning tool for the next generation of wine tourists, the wineries that are invisible today will be harder to surface tomorrow. This is a compounding advantage.

Top 10 Spotlight

These wineries lead Santa Barbara County in digital readiness. They are the most findable, best-reviewed, most brand-consistent, and most commerce-ready operations in the region.

- #1 **Redbarn Cellars (Los Olivos)**
Total: 77/100 BRD: 8/11 WEB: 16/20 COM: 12/15 SOC: 4/10 REV: 19/22 VIS: 18/22
+ WEB, COM, REV, VIS ↓ SOC

- #2 **Buena Tierra Estate (Los Olivos)**
Total: 76/100 BRD: 8/11 WEB: 16/20 COM: 12/15 SOC: 5/10 REV: 17/22 VIS: 18/22
+ WEB, COM, REV, VIS

- #3 **La Junta Vineyards (Los Olivos)**
Total: 76/100 BRD: 8/11 WEB: 16/20 COM: 12/15 SOC: 4/10 REV: 19/22 VIS: 17/22
+ WEB, COM, REV, VIS ↓ SOC

- #4 **Saltbrook Cellars (Los Olivos)**
Total: 75/100 BRD: 8/11 WEB: 17/20 COM: 14/15 SOC: 5/10 REV: 15/22 VIS: 16/22
+ WEB, COM

- #5 **Chapter House Estate (Santa Maria)**
Total: 74/100 BRD: 8/11 WEB: 16/20 COM: 12/15 SOC: 4/10 REV: 15/22 VIS: 19/22
+ WEB, COM, VIS ↓ SOC

- #6 **Wren Hill Cellars (Lompoc)**
Total: 74/100 BRD: 8/11 WEB: 16/20 COM: 14/15 SOC: 4/10 REV: 14/22 VIS: 18/22
+ WEB, COM, VIS ↓ SOC

- #7 **Juniper & Stone (Solvang)**
Total: 73/100 BRD: 8/11 WEB: 17/20 COM: 11/15 SOC: 4/10 REV: 13/22 VIS: 20/22
+ WEB, VIS ↓ SOC

- #8 **Whitford Family Cellars (Santa Maria)**
Total: 73/100 BRD: 8/11 WEB: 15/20 COM: 14/15 SOC: 4/10 REV: 19/22 VIS: 13/22
+ WEB, COM, REV ↓ SOC

- #9 **Seven Bells Estate (Los Olivos)**
Total: 73/100 BRD: 8/11 WEB: 15/20 COM: 12/15 SOC: 4/10 REV: 16/22 VIS: 18/22
+ WEB, COM, VIS ↓ SOC

- #10 **Windrose Vineyards (Los Olivos)**
Total: 72/100 BRD: 8/11 WEB: 15/20 COM: 14/15 SOC: 4/10 REV: 15/22 VIS: 17/22
+ WEB, COM, VIS ↓ SOC

Complete County Rankings

All active wineries in Santa Barbara County, ranked by total digital readiness score.

#	Winery	Tasting Room	BRD /11	WEB /20	COM /15	SOC /10	REV /22	VIS /22	TOTAL /100
1	Redbarn Cellars	Los Olivos	8	16	12	4	19	18	77
2	Buena Tierra Estate	Los Olivos	8	16	12	5	17	18	76
3	La Junta Vineyards	Los Olivos	8	16	12	4	19	17	76
4	Saltbrook Cellars	Los Olivos	8	17	14	5	15	16	75
5	Chapter House Estate	Santa Maria	8	16	12	4	15	19	74
6	Wren Hill Cellars	Lompoc	8	16	14	4	14	18	74
7	Juniper & Stone	Svang	8	17	11	4	13	20	73
8	Whitford Family Cellars	Santa Maria	8	15	14	4	19	13	73
9	Seven Bells Estate	Los Olivos	8	15	12	4	16	18	73
10	Windrose Vineyards	Los Olivos	8	15	14	4	15	17	72
11	Trefry Family Vineyards	Svang	8	15	13	4	15	16	71
12	Heron's Reach Cellars	Svang	7	15	11	4	18	16	71
13	Open Range Cellars	Buellton	8	15	11	2	19	16	70
14	Henley Family Wines	Santa Maria	8	16	13	4	13	16	70
15	Coyote Bend Vineyards	Svang	8	15	14	2	15	16	70
16	Sabatino Family Estate	Los Olivos	8	17	12	4	12	16	69
17	Ashton Family Vineyards	Gaviota	8	15	14	4	15	13	69
18	Galbraith Cellars	Los Olivos	8	15	12	4	13	17	69
19	Iron Bluff Estate	Los Olivos	8	15	10	4	14	18	69
20	Falcon Run Vineyards	Santa Ynez	8	14	12	4	16	14	68
21	Three Oaks Winery	Los Olivos	8	15	12	4	16	14	68
22	Magpie Vineyards	Santa Ynez	8	12	11	5	17	15	68
23	Magnolia Bend Vineyards	Lompoc	8	15	14	4	11	16	68
24	Quintain Estate	Los Olivos	8	14	14	4	12	15	68
25	Greyhill Estate	Santa Barbara	8	16	12	4	13	15	68
26	Inglewood Estate	Los Olivos	8	15	13	4	13	14	67
27	Hollander Estate	Santa Barbara	8	16	12	6	10	15	66
28	Cordillera Cellars	Santa Barbara	8	15	13	4	13	14	66
29	Xanthe Hill Cellars	Santa Barbara	8	15	11	4	11	18	66
30	Boundary Oak Estate	Lompoc	8	15	14	2	15	13	66
31	Wayside Cellars	Lompoc	8	15	11	4	13	15	66
32	Fieldnote Vineyards	Santa Barbara	7	16	11	4	12	16	66

#	Winery	Tasting Room	BRD /11	WEB /20	COM /15	SOC /10	REV /22	VIS /22	TOTAL /100
33	Caprino Cellars	Solvang	6	15	11	4	16	14	66
34	Holloway Vineyards	Buellton	7	17	12	2	11	16	66
35	Mira Loma Vineyards	Solvang	6	15	10	4	17	14	66
36	Kestrel Ridge Cellars	Santa Barbara	8	14	9	3	15	16	65
37	Vesper Family Wines	Santa Ynez	6	15	11	4	16	13	65
38	Tessera Vineyards	Los Olivos	8	14	12	4	14	13	64
39	Devereaux Cellars	Santa Ynez	8	15	10	2	15	15	64
40	Stonechat Estate	Santa Barbara	8	16	13	4	10	14	64
41	Junction Hill Vineyards	Buellton	8	15	11	4	11	16	64
42	Highmark Vineyards	Solvang	8	16	10	2	13	15	64
43	Tallow Hill Vineyards	Los Alamos	4	17	12	7	10	14	64
44	Umbra Cellars	Solvang	8	14	11	4	12	15	64
45	Foxhollow Estate	Santa Barbara	8	15	14	4	10	13	64
46	Verde Pass Estate	Santa Barbara	5	14	11	4	16	14	64
47	Nardini Family Wines	Los Olivos	8	17	14	2	9	14	64
48	Gattuso Family Vineyards	Goleta	8	14	11	2	13	16	64
49	Upper Field Cellars	Santa Ynez	8	15	12	5	11	12	63
50	Fenwick Vineyards	Los Olivos	8	13	9	4	14	15	63
51	Embers Estate	Lompoc	8	17	12	4	8	14	62
52	Zephyr Bluff Vineyards	Santa Barbara	6	15	13	2	12	15	62
53	Otter Creek Estate	Los Olivos	8	14	10	4	11	15	62
54	Ormsby Cellars	Santa Ynez	7	14	12	4	13	12	62
55	Tradewind Cellars	Santa Ynez	8	11	7	4	17	15	62
56	Avena Estate	Solvang	8	15	13	2	10	14	62
57	Chalfont Family Wines	Solvang	6	13	11	4	15	13	62
58	Mariner Estate	Santa Ynez	8	17	11	4	6	15	61
59	Plumeria Estate	Buellton	8	12	12	2	16	11	61
60	Quintet Estate	Los Olivos	8	15	13	4	9	12	60
61	Stone Pine Cellars	Santa Barbara	8	11	9	5	15	12	60
62	Quail Run Vineyards	Santa Maria	8	14	11	4	12	11	60
63	Nocturne Vineyards	Solvang	6	16	10	2	11	15	60
64	Quaintance Vineyards	Buellton	8	15	13	2	9	13	60
65	Ricasoli Cellars	Los Olivos	6	15	10	4	11	13	58
66	Lantern Cellars	Buellton	8	15	10	2	9	15	58
67	Hidden Mesa Cellars	Santa Ynez	5	15	10	4	13	12	58
68	Eight Furrows Vineyards	Buellton	8	13	11	3	11	12	58

#	Winery	Tasting Room	BRD /11	WEB /20	COM /15	SOC /10	REV /22	VIS /22	TOTAL /100
69	Larkspur Family Wines	Los Olivos	8	13	12	4	9	12	58
70	Refrain Cellars	Santa Barbara	8	14	11	2	10	12	58
71	Slow Tide Vineyards	Solvang	6	13	9	4	14	12	58
72	Driftwood Estate	Santa Barbara	6	15	9	4	8	15	57
73	Ferryhouse Estate	Lompoc	8	15	11	2	9	12	56
74	Tanager Cellars	Santa Ynez	8	14	12	4	9	10	56
75	Vista Del Roble	Los Olivos	8	16	10	2	7	13	56
76	Penumbra Vineyards	Lompoc	8	15	11	4	5	13	56
77	Salt & Slate Vineyards	Lompoc	6	16	13	4	5	12	56
78	Kindling Vineyards	Lompoc	8	12	9	2	15	10	56
79	Underhill Estate	Los Olivos	8	14	12	2	9	11	56
80	Lucente Cellars	Los Olivos	8	14	11	4	8	10	55
81	Kingsbury Cellars	Buellton	8	11	9	4	10	13	55
82	Tonelli Vineyards	Los Olivos	8	13	13	4	6	11	55
83	Thurston Vineyards	Lompoc	8	14	12	2	8	11	54
84	Driftless Vineyards	Los Olivos	8	15	12	2	5	13	54
85	Yorkfield Family Cellars	Lompoc	8	15	12	4	5	11	54
86	Glasshouse Vineyards	Los Olivos	8	16	11	4	3	13	54
87	Almanac Cellars	Los Olivos	8	13	9	4	9	12	54
88	Buck Hollow Estate	Solvang	6	13	8	4	13	11	54
89	Cypress Knoll Cellars	Lompoc	8	12	11	4	8	11	54
90	Jardine Family Vineyards	Los Olivos	6	16	10	3	6	13	54
91	Compass Rose Vineyards	Los Olivos	6	13	9	4	10	12	54
92	Caldera Cellars	Los Olivos	8	15	10	4	5	12	54
93	Montaccolo Estate	Los Olivos	6	13	8	4	12	11	54
94	Thornlee Vineyards	Santa Maria	5	15	13	3	5	12	53
95	Anchor & Vine	Santa Maria	6	11	9	3	14	10	53
96	Roadrunner Cellars	Los Olivos	8	16	10	2	5	12	52
97	Casa Llano	Los Alamos	8	15	9	2	7	11	52
98	Dolcetto Family Wines	Santa Barbara	6	14	9	4	7	13	52
99	Bodega Mendoza	Los Alamos	6	15	11	4	5	11	52
100	Tessitura Estate	Santa Barbara	8	11	6	4	10	13	52
101	Selwyn Cellars	Santa Ynez	8	14	12	4	3	11	52
102	Filament Cellars	Santa Ynez	8	14	9	2	9	10	52
103	Pavone Vineyards	Los Olivos	8	12	9	4	8	11	52
104	Quiet Harbor Estate	Buellton	6	15	9	4	5	13	52

#	Winery	Tasting Room	BRD /11	WEB /20	COM /15	SOC /10	REV /22	VIS /22	TOTAL /100
105	Lodestar Cellars	Lompoc	6	11	8	4	11	12	52
106	Northrup Family Vineyards	Santa Maria	8	14	10	3	6	10	51
107	Heron Lane Estate	Solvang	8	14	11	3	2	13	51
108	Bellfield Vineyards	Santa Barbara	6	11	5	2	15	12	51
109	Sundial Estate	Orcutt	8	16	10	3	2	12	51
110	Bramble Vineyards	Lompoc	6	11	7	3	13	11	51
111	Las Encinas Cellars	Los Olivos	6	13	10	4	10	8	50
112	Old Mill Estate	Santa Barbara	6	12	9	4	11	9	50
113	Common Thread Vineyards	Solvang	6	14	8	2	8	12	50
114	Vandermeer Estate	Solvang	8	14	9	3	4	12	50
115	Echo Pass Vineyards	Lompoc	8	12	8	3	7	12	50
116	Eldridge Family Estate	Buellton	8	13	10	2	5	11	50
117	Yarrow Creek Estate	Buellton	8	13	9	3	7	9	49
118	Owl Canyon Cellars	Buellton	6	14	9	3	6	11	49
119	Oratorio Cellars	Solvang	6	13	8	2	9	11	49
120	Pemberton Estate	Lompoc	8	11	11	4	3	12	48
121	El Cerrito Cellars	Solvang	8	12	12	2	6	9	48
122	Wexford Vineyards	Santa Barbara	8	12	9	4	6	10	48
123	Marigold Vineyards	Los Olivos	8	15	11	3	2	9	48
124	Cold Creek Wine Co.	Santa Ynez	6	12	7	4	8	11	48
125	1912 Cellars	Lompoc	6	16	9	3	2	12	48
126	Blackthorn Estate	Los Alamos	8	13	11	2	5	9	48
127	Bramwell Vineyards	Los Olivos	8	11	9	2	9	8	48
128	Songline Vineyards	Buellton	6	15	12	4	1	10	48
129	Blue Hour Estate	Santa Barbara	6	12	6	2	9	13	48
130	Roughcut Estate	Los Olivos	8	15	8	2	3	11	47
131	Halyard Estate	Santa Barbara	6	12	8	3	7	11	47
132	Field Notebook Cellars	Santa Barbara	6	10	6	4	11	10	46
133	Ridgeline Wine Co.	Lompoc	6	13	6	2	9	11	46
134	Forty-Two Vines	Los Olivos	6	13	8	2	6	11	46
135	Idlewild Cellars	Santa Barbara	6	10	12	3	8	7	46
136	Long Light Vineyards	Los Olivos	8	14	8	2	5	9	46
137	Quarry Hill Vineyards	Los Alamos	8	12	12	2	4	8	46
138	Calderwood Cellars	Santa Barbara	4	10	7	3	12	9	45
139	Foxglove Cellars	Lompoc	6	14	9	2	3	10	44
140	Fattoria Bianca	Santa Barbara	7	12	9	4	3	9	44

#	Winery	Tasting Room	BRD /11	WEB /20	COM /15	SOC /10	REV /22	VIS /22	TOTAL /100
141	Marble Creek Estate	Camarillo	4	14	11	3	2	10	44
142	Camino Alto Estate	Lompoc	6	12	5	2	7	12	44
143	Plain Air Vineyards	Santa Ynez	8	7	3	2	14	9	44
144	Goldenrod Vineyards	Santa Maria	8	12	7	2	2	12	42
145	True North Cellars	Solvang	5	7	6	2	12	10	42
146	Southfork Cellars	Los Olivos	8	10	8	2	3	11	42
147	Hawkstone Vineyards	Santa Maria	6	10	5	5	7	8	41
148	Pine Hollow Estate	Santa Barbara	6	11	9	2	4	9	41
149	Long Meadow Wines	Los Alamos	6	11	5	2	7	10	40
150	Mortimer Estate	Los Olivos	8	10	6	2	6	8	40

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Key Findings

1. The average winery scores 57.4/100, mid-pack territory.

Most wineries have a functional online presence but are leaving discoverability and revenue on the table. The gap between the county's best digital operators and the median is significant and actionable. Every point below the top tier represents visitors who are choosing someone else.

2. Review Authority averages 10.0/22 (45% of max), the biggest opportunity gap.

Pre-planners start with reviews. Google review volume, Yelp claimed status, and especially TripAdvisor presence are where most wineries fall short. The top performers maintain 100+ Google reviews with a 4.4+ rating and have active TripAdvisor listings with recent review activity.

3. 67 wineries have minimal or no Google review presence.

For the spontaneous visitor, the person typing "wine tasting Los Olivos" into Google Maps, reviews are the entire game. The winery with 200 reviews and a 4.6 rating wins. The one with 28 reviews and no photos loses before anyone clicks through.

4. 287 wineries have zero TripAdvisor reviews.

TripAdvisor is often the pre-planner's starting point for comparing experiences, checking vibes, and deciding whether a stop fits a group or couple. Wineries with no TA presence are invisible to this high-intent segment. Even a handful of reviews with recent activity makes a meaningful difference.

5. Online Visibility averages just 12.7/22 (58% of max).

Most wineries are not showing up for the discovery queries visitors actually type: "Santa Ynez wine tasting," "best wineries Santa Barbara," "Lompoc wine trail." These queries fill tasting rooms. A winery that doesn't surface in the top results for their corridor is not in the consideration set for spontaneous visitors.

6. 340 wineries are completely invisible to AI trip planners.

We asked ChatGPT, Claude, Perplexity, and Google Gemini 12 real trip-planning questions tourists use, "I'm going to Santa Ynez this weekend, what should I do?" "best wineries near Solvang," "dog-friendly wine tasting", and tracked which wineries each AI recommended. Only 94 wineries were mentioned at all, and just 23 were recommended consistently. AI-powered trip planning is growing rapidly and operates on different signals than Google search. A winery with strong SEO can still be invisible to AI, and vice versa. This is a new competitive dimension that will matter as much as traditional search within two years.

7. 287 wineries have no clear wine club signup path.

Wine club acquisition is the #1 DTC revenue driver. A motivated visitor who had a great tasting experience is ready to join, if they can't find and sign up in two clicks, that member is gone.

8. 382 wineries have no visible shipping information.

Shipping clarity converts browsers to buyers. An out-of-state visitor who can't quickly confirm you ship to their state abandons the purchase. This is low-effort, high-impact, a single page with a clear state list.

9. 287 wineries have dormant or nonexistent Instagram.

More than six in ten wine tasting consumers look at a winery's social media when planning a trip. Instagram validates the pre-planner's shortlist. A dormant account signals a closed or disengaged business.

10. 331 wineries lack structured data (schema markup).

Schema markup helps Google understand your business and display rich results in search. It's a low-effort technical fix that improves how your listing appears to every visitor archetype.

11. 150 wineries have no press coverage across our 20-publication tracked list, while 0 have at least one national or wine-trade mention.

Press and wine-trade coverage is a durable third-party authority signal that AI assistants and Google both weigh alongside reviews. The tracked list spans local Santa Barbara and Santa Ynez Valley papers, California regional press, and wine-trade titles (Wine Spectator, Wine Enthusiast, Decanter, SevenFifty Daily, Vinepair, Punch), plus national food and travel magazines. Wineries with zero mentions sit at a measurable disadvantage on two surfaces at once: Google's E-E-A-T signal and the entity graph that AI assistants build before answering "best winery for X." Individual winery reports call out the specific publications to pitch for easiest wins.

What This Score Means For Your Winery

56 points in this rubric are things you can do yourself.

Brand Consistency, Web Presence Quality, Social Signals, and Direct Commerce are either one-time fixes or weekly routine fixes. Claim your Google listing. Build a wine club page. Add your shipping states. Post to Instagram once a week. These are attention-to-detail items, not strategy items. Most can be knocked out in a few focused days, and once they're done, they're done. If your score is low because of these dimensions, the path forward is straightforward and entirely in your hands.

The other 44 points are where we come in.

Review Authority and Online Visibility, including the emerging AI discovery channel, require sustained strategy, not a weekend project. Building a review profile that earns trust from pre-planners, appearing in the search results and AI recommendations that fill tasting rooms, and turning web traffic into wine club members: these are operational challenges that compound over time. They're also where the biggest gap exists between the top-performing wineries in this county and everyone else.

We are fractional operators, not consultants. We don't hand you a report and walk away. We embed with your team and execute: SEO, citations, review strategy, AI visibility, wine club optimization, and customer profitability. If you can handle the 56 points on your own, great. If you need help with those, too, we can do that. Either way, the 44 strategic points are where the real separation happens, and that's where we do our best work.

If You Want to Act on This Report

Every winery in this report was scored using the same framework, by the same hand, against the same peer set. That work happens every month whether you subscribe or not. What changes when you join Monitor is that you see what we see when we see it: your scorecard the day it is generated, the seven Drift Watch alerts the month they fire, the peer movement that put a competitor ahead of you before it shows up in the next quarterly issue.

Monitor is not the upgrade tier. It is the operating floor for any Santa Barbara County winery that wants to act on what this report describes rather than read about it once a quarter. Discover keeps the door open for industry watchers, multi-region subscribers, and operators in early evaluation. Monitor is the floor for operators who have decided to participate.

If the gaps in your winery's scorecard surprised you, the right move is not another quarter of waiting. The right move is monthly visibility, a path forward for each finding, and a measurable trajectory back to where you want your winery to be.

If any of this landed, let's talk.

Not a pitch. A conversation about where your winery sits and what moving the needle would look like. I can start with a complimentary diagnostic for your winery: a detailed breakdown of where you're strong, where the gaps are, and what the industry at large is doing differently. I'll bring the specifics: the 56 self-fix points you're leaving on the table and the strategic 44 that compound over time. You bring the context of what's already been tried.

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About Central Coast IQ

Central Coast IQ is the wine country division of Main Street IQ, a fractional back-office operator for direct-to-consumer brands. We help wineries fix the operational gaps that cost them customers, from SEO and citations to wine club optimization and compliance. We're not consultants. We're embedded operators.

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Disclaimer: Scores in this report are based on publicly available data collected via automated tools. While we strive for accuracy, some data points may be incomplete or reflect temporary conditions. This report is provided for informational purposes and does not constitute professional advice. Scores may change as data collection methods improve.

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