



# Wine Industry Metrics - Flash Resellers - December 2012

Wines Vines Analytics

## Wineries Continue to Enter Flash Market

Nearly four times as many wineries had wines offered through flash sites in December 2012 than in January 2011. The 382 unique, U.S. wineries with offers in December 2012 represented the highest monthly total since WinesVinesDATA first started tracking flash offers. Flash sites have continued to stay popular with wineries looking to clear out inventory quickly as well as take advantage of the sites' email lists of prospective customers.

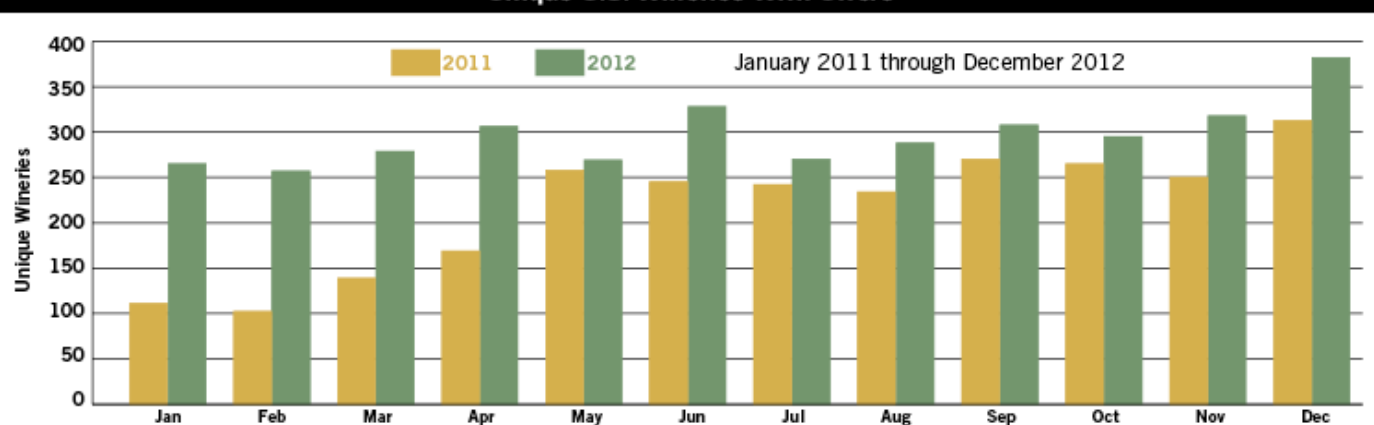
| Flash Reseller Offers >> | 12 Months   |   |
|--------------------------|---|---|
|                          | Month   | Months  |
| December 2012            | 573   | 5,402   |
| December 2011            | 547  | 3,990  |

### FLASH SITES COMPARED FOR DECEMBER

| Flash Reseller     | No. of Domestic December Offers | Average Flash Price (750ml) | Average Discount | Pageviews* (000) |
|--------------------|---------------------------------|-----------------------------|------------------|------------------|
| CellarThief        | 4                               | \$22.49                     | 45%              | NA               |
| Cinderella Wine    | 7                               | \$31.30                     | 39%              | 16               |
| Invino             | 207                             | \$27.40                     | 40%              | 275              |
| Last Bottle Wines  | 7                               | \$32.36                     | 48%              | 24               |
| Last Call Wines    | 84                              | \$32.97                     | 38%              | 53               |
| Lot18              | 55                              | \$32.04                     | 28%              | 300              |
| The Wine Spies     | 25                              | \$25.97                     | 30%              | 38               |
| Wine Woot          | 55                              | \$20.62                     | 39%              | 745              |
| Wines Til Sold Out | 58                              | \$21.15                     | 52%              | 351              |
| WineShopper        | 25                              | \$16.05                     | 40%              | 160              |

Source: WinesVinesDATA, winesandvines.com/flash \*Source: Compete.com, Dec. 2012

### Unique U.S. Wineries With Offers



Source: WinesVinesDATA, winesandvines.com/flash

### FLASH DISCOUNTS FOR A SAMPLE OF CABERNET SAUVIGNON OFFERED IN DECEMBER

| Discount | Winery/Brand        | Region/Vineyard  | State | Varietal       | Vintage | Winery Retail | Flash Price | Winery Size In Cases | Flash Site         |
|----------|---------------------|------------------|-------|----------------|---------|---------------|-------------|----------------------|--------------------|
| 24%      | Amavi Cellars       | Washington       | WA    | Cabernet Sauv. | 2009    | \$26.33       | \$20.00     | 8,600                | Lot18              |
| 33%      | Heitz Wine Cellars  | Napa Valley      | CA    | Cabernet Sauv. | 2005    | \$224.99      | \$149.99    | 40,000               | Last Call Wines    |
| 33%      | Dunham Cellars      | Columbia Valley  | WA    | Cabernet Sauv. | 2009    | \$59.99       | \$39.99     | 15,000               | Last Call Wines    |
| 41%      | Arroba Winery       | Sonoma           | CA    | Cabernet Sauv. | 2009    | \$45.00       | \$26.49     | 15,000               | Wine Spies         |
| 44%      | Force of Nature     | Central Coast    | CA    | Cabernet Sauv. | 2009    | \$30.00       | \$16.95     | 1,000                | Prince of Wine     |
| 48%      | Atlas Peak          | Napa Valley      | CA    | Cabernet Sauv. | 2007    | \$95.75       | \$50.00     | 250,000              | Wine Woot          |
| 58%      | Thumbprint Cellars  | Alexander Valley | CA    | Cabernet Sauv. | 2010    | \$45.00       | \$18.99     | 4,000                | Wines Til Sold Out |
| 67%      | Michel-Schlumberger | Dry Creek Valley | CA    | Cabernet Sauv. | 2009    | \$75.00       | \$24.99     | 10,000               | Wines Til Sold Out |

Source: WinesVinesDATA

In other flash news, Lot 18 announced it would lay off 25 employees and is shifting from being just a

flash site to operating a wine club. A spokesman for the company said Lot 18's current customers would continue to receive the same selection of wines, and the club would complement its flash offers. Lot 18 had once led the flash market by offers but has since slipped behind Invino and Wines Til Sold Out.

Cellar Angels announced a flat fee of \$10 for all ground shipping, regardless of the size of wine order. Salon.com and The Wine Spies announced a partnership for an online wine store that will offer a wine picked by The Wine Spies every day.

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## WINES & VINES

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