Wine Industry Metrics - Flash Resellers - July 2013

Wines Vines Analytics

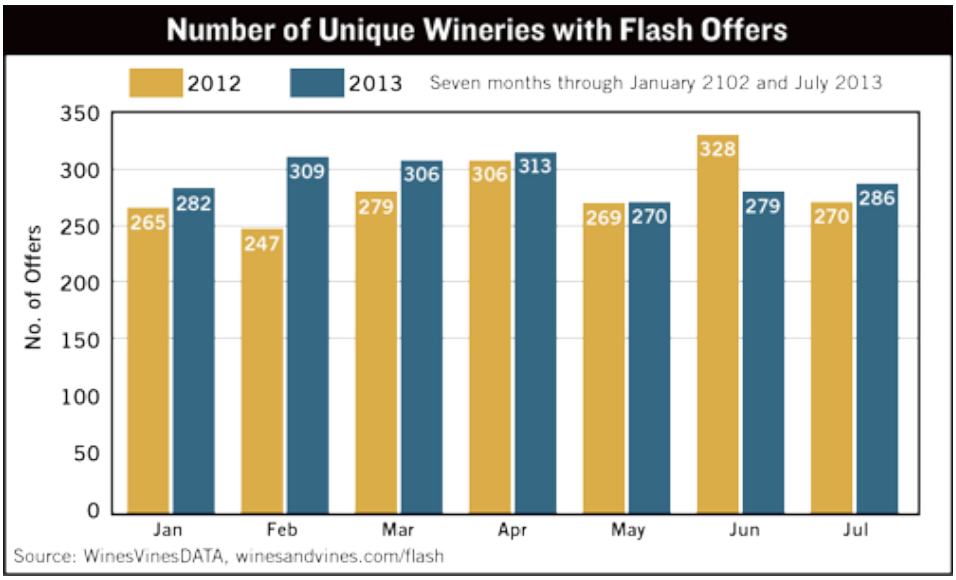
Decline in Flash Offers Slows

A steady decline that began in January of the monthly total of flash offers for domestic wines abated somewhat in July with total offers only 11 less than in 2012. Invino accounted for more than a quarter of the total domestic wine offers with 111, which is more than double what the website offered in June.

Flash Reseller Offers »	Month	12 Months
July 2013	402	5,162
July 2012	413	5,127

Unique Wineries with Offers

The number of unique domestic wineries offering wines through flash sites in the past six months of 2013 is also higher than for the same period in 2012. So far this year, 2,045 wineries have offered wines compared to 1,964 last year.



Most Flash Wines from California

Looking at offers by winery location, Napa and Sonoma account for 65% of the offers this year, which is down from 71% in 2012. When including offers from the other regions of California, however, the Golden State is the source for 87% of all the wines offered through flash sites this year. Offers for wines from New York wineries, while still a tiny percentage of the total, rose from 7 in 2012 to 36 this year and flash sites also offered 42 more Washington wines this year.

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SUMMARY OF FLASH OFFERS BY STATE

Winery State – County	2012	2013
California – Napa	1,100	938
California – Sonoma	1,012	825
California – all other areas	606	634
Washington	116	158
Oregon	100	108
Pennsylvania*	18	44
New York	7	36
All other states	17	10

*Refers to Newman Wines, which is based in Pennsylvania but sells California wines.

Source: WinesVinesDATA, winesandvines.com/flash

FLASH SITES COMPARED FOR JULY

Flash Reseller	No. of Domestic July Offers	Average Flash Price (750ml)	Average Discount	Pageviews* (000)
Cinderella Wine	6	$29.67	32%	7
Invino	111	$24.09	39%	89
Last Bottle Wines	14	$29.29	46%	117
Last Call Wines	56	$22.02	44%	29
Lot18	32	$17.82	28%	98
The Wine Spies	25	$23.11	34%	6
Wine Woot	40	$17.45	43%	286
Wines Til Sold Out	60	$19.99	51%	297
WineShopper	21	$18.51	37%	98

Source: WinesVinesDATA, winesandvines.com/flash *Source: Compete.com, July 2013

FLASH DISCOUNTS FOR A SAMPLE OF SONOMA COUNTY WINES OFFERED IN JULY

Discount	Winery/Brand	Winery State	Varietal/Type	Vintage	Winery Retail	Flash Price	Winery Size In Cases	Flash Site
13%	Patz & Hall Wine Company	CA	Chardonnay	2011	$40.00	$34.99	2,700	Good Juice Direct
29%	Deerfield Ranch Winery	CA	Cabernet Sauvignon	2007	$38.00	$26.99	15,000	Wine Spies
37%	Plata Wine Partners	CA	Chardonnay	2011	$30.00	$18.83	100,000	Lot18
41%	Fort Ross Vineyard & Winery	CA	Pinot Noir	2008	$42.00	$24.95	4,500	Prince of Wine
50%	Schug Carneros Estate Winery	CA	Blend - Red	2011	$32.00	$15.99	40,000	Wines Til Sold Out
56%	Kunde Family Estate	CA	Zinfandel	2007	$24.99	$10.99	75,000	Last Call Wines
58%	Landmark Vineyards	CA	Syrah	2010	$45.00	$19.00	25,000	Last Bottle Wines
62%	Anaba Wines	CA	Pinot Noir	2010	$65.00	$24.99	6,500	Wines Til Sold Out

Source: WinesVinesDATA

Flash Methodology

Wines Vines Analytics' research team captures flash offer details for hundreds of domestic wine offers each week. The team monitors offers presented through 17 flash reseller sites every day of the year. Each offer is reviewed and tied to the source winery, and the specific details are recorded in a database of flash offers.

When flash websites hold special events with a high number of offers, Wines Vines Analytics monitors the site closely, often capturing a new offer every few minutes. At the close of each month, the offers are reviewed for accuracy, and the findings are reported by *Wines & Vines'* editorial staff for the current month along with time-series comparisons of pricing, winery size and wine types.

WINES & VINES

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