Wine Industry Metrics - Flash Resellers - September 2013

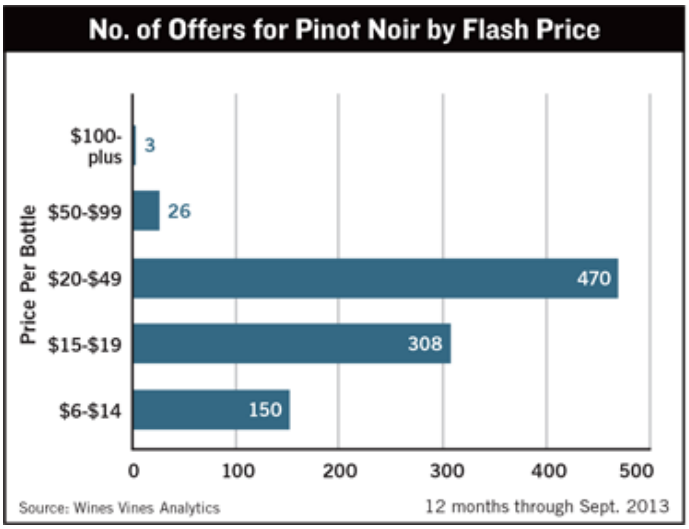
Wines Vines Analytics

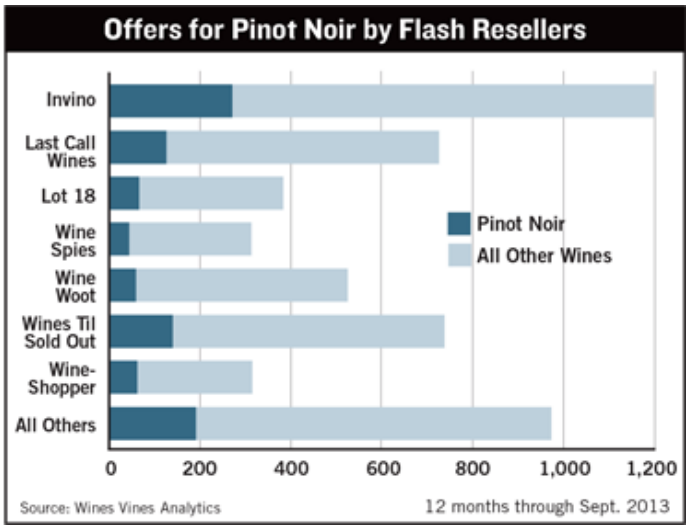
Surge in Flash Offers Fueled by Invino

A special Labor Day sales event by leading flash reseller Invino contributed to a 17% increase in total offers of domestic wines by wine flash sales sites in September. The 559 offers made by all flash resellers monitored by Wines Vines Analytics topped the 476 in September 2012 and was the highest monthly total in 2013 so far.

Flash Reseller Offers »	Month		12 Months	
September 2013	559	17%	5,173	-2%
September 2012	476		5,253	

Invino's 201 offers for wines from 126 unique U.S. wineries represented 36% of the total offers, while Last Call Wines — the site with the second highest total offers — accounted for only 13% of the total with 74 offers. Special events by Invino regularly trigger significant spikes in the number of flash offers. A June Wines Vines Analytics report found that in a 12 month period the website's total offers would often double from month to month because of special events.





Pinot Noir Popular in the Flash Segment

While Cabernet Sauvignon is the most prevalent wine on flash sites, Pinot Noir is usually second in total number of offers although red blends have taken the second spot a few times in the past.

In the past 12 months, there have been 959 offers for domestic Pinot Noir wines or 18.5% of the 5,171 total offers by all the flash resellers. Almost all of these Pinots, or 81%, came from California and nearly half of those wines were offered by wineries in Sonoma County, although Napa County wineries accounted for 197 Pinot offers.

Oregon, the other leading source of U.S. Pinot Noir had 143 offers and 94 of those were wines made by Yamhill County wineries.

FLASH SITES COMPARED FOR SEPTEMBER

Flash Reseller	No. of Domestic September Offers	Average Flash Price (750ml)	Average Discount	Pageviews* (000)
Cinderella Wine	8	$37.79	40%	1
Invino	201	$25.66	36%	79
Last Bottle Wines	17	$32.32	42%	77
Last Call Wines	74	$23.97	44%	53
Lot18	29	$20.29	24%	301
Wine Spies	28	$28.10	34%	8
Wine Woot	37	$18.47	47%	315
Wines Til Sold Out	60	$22.69	52%	277
WineShopper	19	$15.39	27%	90

Source: Wines Vines Analytics, winesandvines.com/flash *Source: Compete.com, Sept. 2013

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FLASH DISCOUNTS FOR A SAMPLE OF PINOT NOIR OFFERED IN SEPTEMBER

Discount	Winery/Brand	Winery State	Varietal/Type	Vintage	Winery Retail	Flash Price	Winery Size In Cases	Flash Site
17%	W H Smith Wines	CA	Pinot Noir	2008	$54.00	$44.99	6000	Lot18
27%	Belle Glos	CA	Pinot Noir	2012	$26.00	$19.09	200000	Wines Til Sold Out
39%	Iron Horse Vineyards	CA	Pinot Noir	2007	$54.50	$33.25	30000	Rue La La
40%	Seufert Winery	OR	Pinot Noir	2007	$30.00	$17.99	2500	Last Bottle Wines
44%	David Bruce Winery	CA	Pinot Noir	2009	$44.99	$24.99	30000	Wines Til Sold Out
50%	Panther Creek Cellars	OR	Pinot Noir	2009	$40.00	$19.99	7500	Wines Til Sold Out
60%	Archery Summit Winery	OR	Pinot Noir	2011	$50.00	$19.99	12500	Wines Til Sold Out
61%	Beringer Vineyards	CA	Pinot Noir	2010	$36.00	$14.00	9000000	LetsPour

Source: Wines Vines Analytics

WINES & VINES

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