Wine Industry Metrics - Flash Resellers - May 2014

Wines Vines Analytics

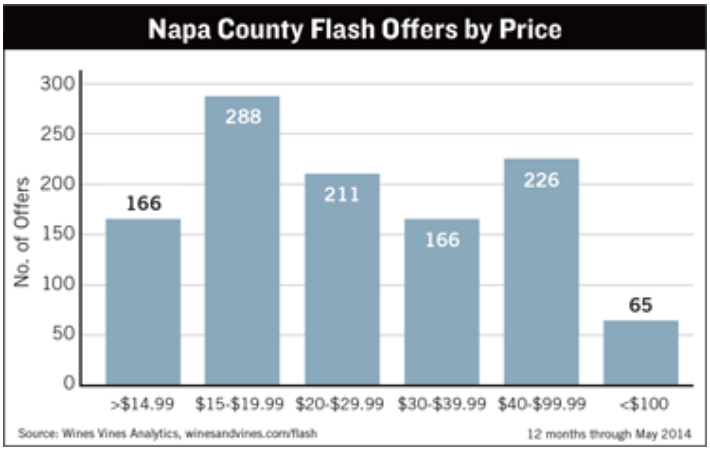
Flurry of Offers on Holiday Weekend

Flash websites posted 151 more offers for domestic wines in May than in the previous month and 246 more than in May of 2013. Invino's 190 offers accounted for 31% of the 610 total offers and was the most of all flash sites. Last Call Wines and Wines Til Sold Out had the second highest number of offers with 96 each. Of Invino's total offers, 100 came on May 25 during a special Memorial Day sale.

Flash Reseller Offers »	Month	12 Months
May 2014	610	5,952
May 2013	364	5,276

Napa County wines accounted for 61, or 32%, of Invino's 190 offers. In the 12 months through the end of May, Napa County wineries accounted for 1,122 offers or 19% of the 5,954 total offers. For the same 12-month period in 2013, nearly a quarter of the 5,274 total offers were for wines from Napa County wineries.

Wines Vines Analytics tracks flash offers by both the winery and the vineyard source for the wine. Based by vineyard region, Napa County accounted for 1,730, or 29%, of the 5,954 wines offers in the past 12 months. Wines from the North Coast region, which includes Napa, Sonoma, Mendocino and Lake counties accounted for 64% of all wines offered by flash sites and California wines in general took a 90% share of total flash offers. Napa County wines represented 46% of the North Coast offers and 32% of all the California offers.



Flash websites typically offer Napa County wines with a price of between $11 and $39.99. For the 12-month period ending in May 2014, wines with a flash price in this range accounted for 73% of all offers and during the same period in 2013 nearly 70% of all offers fell in this range. Despite flash discounts that typically range from 30% to 50%, about 20% of the Napa County wines offered in the past 12 months had flash prices between $40 to $99 and 65 wines had flash prices of more than $100 because of the high retail prices for Napa wines.

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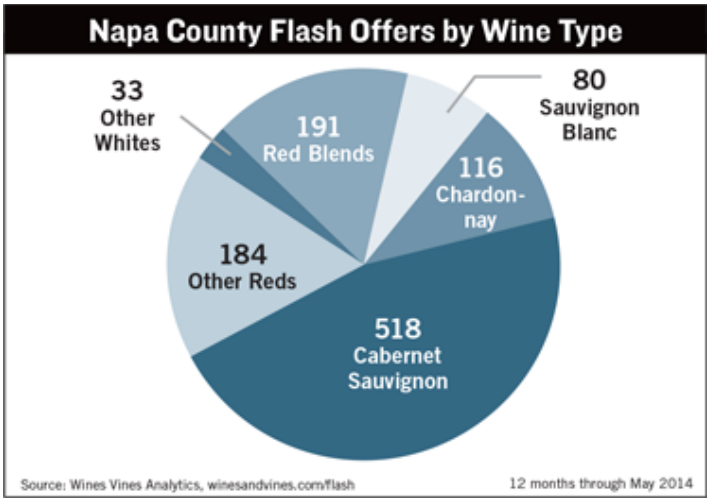

Most of the Napa County wines offered by flash sites were either Cabernet Sauvignon or red blends. In the past 12 months, flash sites made 518 offers for Napa Valley Cabernet Sauvignon and 191 offers for red blends. The two wine types represented 63% of all of the offers from Napa wineries. In the 12 months ending in May 2013, Cabernet and red blends took a 70% share of the 1,234 total offers from Napa.

FLASH SITES COMPARED FOR MAY

Flash Reseller	No. of Domestic May Offers	Average Flash Price (750ml)	Average Discount	Pageviews* (000)
Cinderella Wine	4	$20.45	39%	46
Invino	190	$23.43	36%	109
Last Bottle Wines	10	$24.30	37%	96
Last Call Wines	96	$23.92	50%	15
Lot18	32	$22.17	24%	322
The Wine Spies	29	$25.30	29%	72
Wine Woot	51	$18.17	48%	246
Wines Til Sold Out	96	$19.57	53%	1,271
WineShopper	28	$17.22	38%	53

Source: Wines Vines Analytics, winesandvines.com/flash *Source: Compete.com, May 2014

FLASH DISCOUNTS FOR A SAMPLE OF NAPA COUNTY WINES OFFERED IN MAY

Discount	Winery/Brand	Region	Varietal	Vintage	Winery Retail	Flash Price	Winery Size In Cases	Flash Site
18%	Frank Family Vineyards	Napa Valley	Zinfandel	2011	$36.75	$29.99	40,000	WineHeist
25%	Nickel & Nickel	Oakville	Cabernet Sauvignon	2010	$100.00	$75.00	20,000	Last Call Wines
28%	Caymus Vineyards	Napa Valley	Cabernet Sauvignon	2012	$76.00	$54.98	90,000	Wired For Wine
29%	Ramey Wine Cellars	Napa Valley	Cabernet Sauvignon	2010	$75.00	$52.99	35,000	Good Juice Direct
40%	Inglenook	Rutherford	Blend - Red	2010	$300.00	$179.98	20,000	Last Call Wines
41%	Beaulieu Vineyard	Napa Valley	Cabernet Sauvignon	2010	$135.00	$79.99	1,100,000	Wines Til Sold Out
58%	Scotto Family Cellars	Napa Valley	Blend - Red	2009	$39.99	$16.99	25,000	Last Call Wines
60%	Clos Pegase Winery	Napa Valley	Cabernet Sauvignon	2006	$100.00	$39.99	40,000	Wines Til Sold Out

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

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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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