

Wine Industry Metrics - Flash Resellers - March 2013

Wines Vines Analytics

Flash Site Offers of Domestic Wines Grow 13% Annually

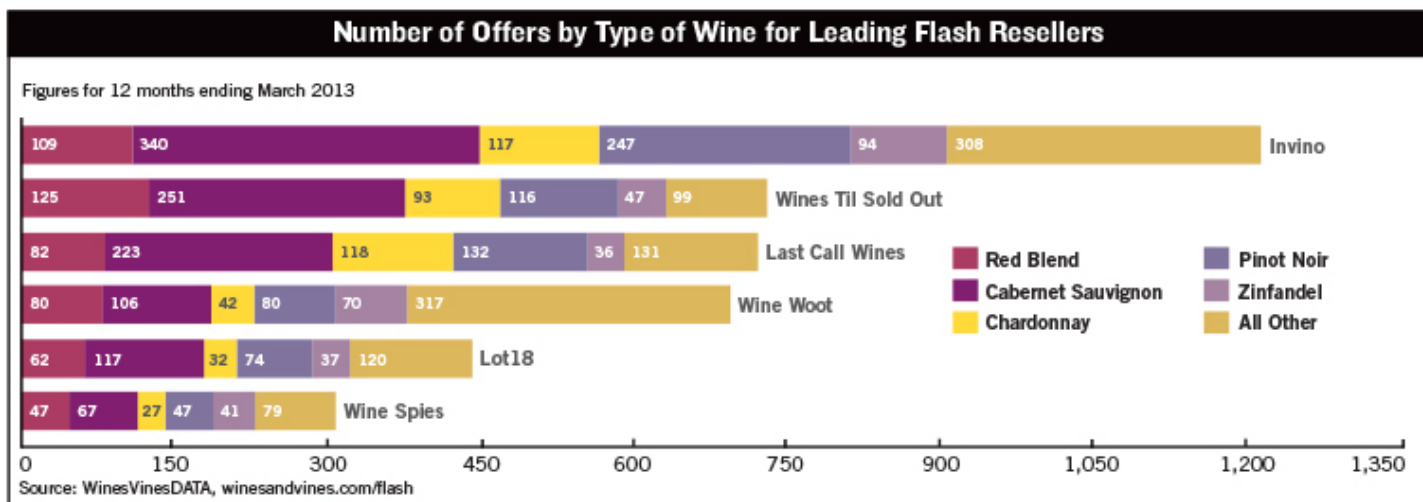
The total number of offers for domestic wines by flash resellers continues to grow year to year but March did see a small drop in offers. Invino had the most offers in March with 69 from 59 unique wineries. The average flash price for wines proffered by Invino was \$19.87. WinesVinesDATA is now tracking 18 web sites offering flash sales. The average retail price for wines offered from all 18 is \$41.53 with an average flash price of \$27.36, a 34% discount.

| Flash Reseller Offers » | Month | 12 Months |
|-------------------------|-------|-----------|
| March 2013 | 396 | 5,335 |
| March 2012 | 427 | 4,706 |

Wine Woot had the most diverse selection of wines in the past 12 months. Compared to the five other major sites with the most offers, Wine Woot posted 317 offers, or nearly half of its total offers, for wines like Grenache or less popular major varietals like Merlot and Syrah.

The most popular wine in the flash segment, Cabernet Sauvignon, accounted for just 15% of Wine Woot's offers. Wines Til Sold Out, on the other hand, offered 251 Cabs, 125 red blends and 116 Pinot Noirs with just 99 offers, or 14% of its total, for less popular wines.

Invino offered a high number of Cabernet and Pinot, but the site also had 308 offers for other varieties. Cabernet, Pinot Noir and red blends accounted for 57% of the 5,333 total offers in the past 12 months by all flash sites.



FLASH DISCOUNTS FOR A SAMPLE OF WINES FROM CALIFORNIA'S CENTRAL COAST IN MARCH

| Discount | Winery/Brand | Region/Vineyard | State | Varietal | Vintage | Winery Retail | Flash Price | Winery Size In Cases | Flash Site |
|----------|------------------------|-----------------|-------|--------------------|---------|---------------|-------------|----------------------|--------------------|
| 11% | L'Aventure | Paso Robles | CA | Red Blend | 2010 | \$45.00 | \$39.99 | 6500 | Lot18 |
| 25% | Vina Robles, Inc. | Paso Robles | CA | Red Blend | 2010 | \$20.00 | \$14.99 | 25000 | Good Juice Direct |
| 26% | Wesley Ashley Wines | Santa Barbara | CA | Red Blend | 2009 | \$38.00 | \$27.99 | 1000 | Cellar Angels |
| 38% | Point Concepcion Wines | Santa Barbara | CA | Pinot Noir | 2007 | \$40.00 | \$24.99 | 2200 | WineShopper |
| 44% | Clayhouse Wines | Paso Robles | CA | White Blend | 2011 | \$29.25 | \$16.25 | 25000 | Wine Woot |
| 52% | McClellan Vineyards | Paso Robles | CA | Syrah | 2007 | \$23.83 | \$11.50 | 8000 | Wine Woot |
| 53% | Roblar Winery | Santa Barbara | CA | Cabernet Sauvignon | 2010 | \$30.00 | \$13.99 | 5000 | Wines Til Sold Out |
| 57% | Derby Wine Estates | Paso Robles | CA | White Blend | 2009 | \$30.00 | \$13.00 | 1800 | Last Bottle Wines |

Source: WinesVinesDATA

FLASH SITES COMPARED FOR MARCH

| Flash Reseller | No. of Domestic March Offers | Average Flash Price (750ml) | Average Discount | Pageviews* (000) |
|--------------------|------------------------------|-----------------------------|------------------|------------------|
| Cinderella Wine | 4 | \$23.91 | 39% | 20 |
| Invino | 69 | \$19.87 | 42% | 72 |
| Last Bottle Wines | 17 | \$25.47 | 46% | 61 |
| Last Call Wines | 42 | \$39.08 | 37% | 51 |
| Lot18 | 36 | \$30.58 | 24% | 249 |
| The Wine Spies | 24 | \$27.07 | 30% | 29 |
| Wine Woot | 43 | \$17.67 | 44% | 359 |
| Wines Til Sold Out | 64 | \$18.17 | 52% | 326 |
| WineShopper | 26 | \$15.32 | 39% | 99 |

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

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

866.453.9701 | 415.453.9700 | Fax: 415.453.2517 | 65 Mitchell Blvd., Ste. A San Rafael, CA 94903

info@winesandvines.com

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