

Wine Industry Metrics - Flash Resellers - July 2017

Wines Vines Analytics

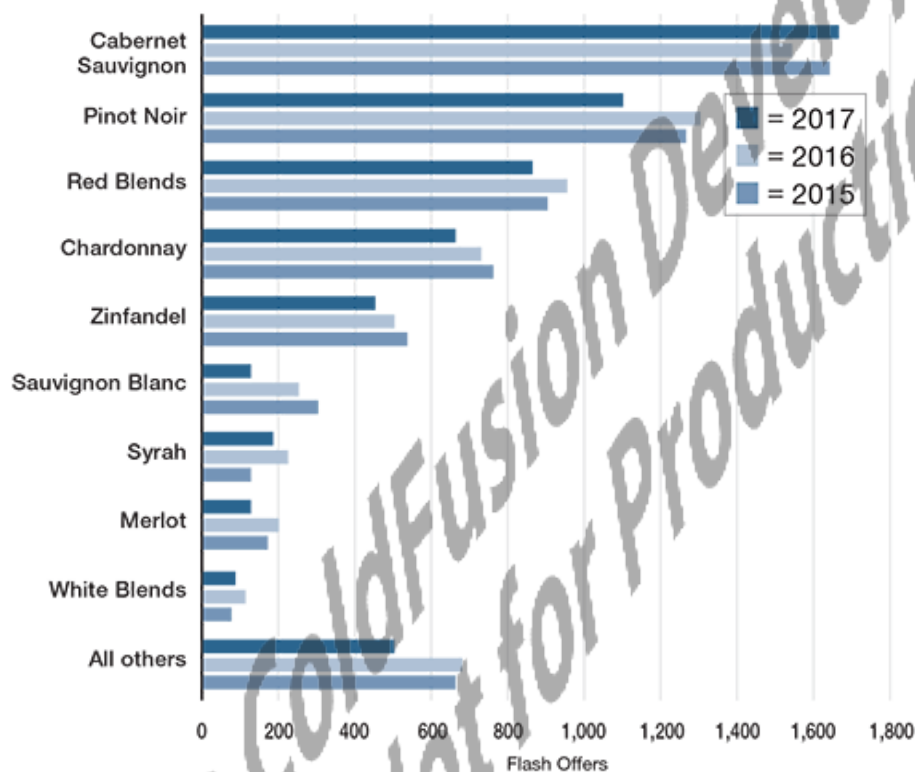
Special Sale Boosts Flash Offers

An Invino sales promotion tied to the Fourth of July holiday helped nudge the monthly total of flash offers for domestic wines barely past the total during July last year. The 12-month total, however, fell 8%.

Flash Reseller Offers »	Month	12 Months
July 2017	515	5,907
July 2016	511	6,449

Invino ran a similar sale in 2016 in which it made 162 offers and this year it topped that by making 192 offers for wines from 127 wineries. Invino's offers accounted for 37% of the monthly total and was nearly twice as many as the 99 offers by Last Call Wines, which had the next highest total.

NUMBER OF FLASH OFFERS



Source: Wines Vines Analytics, winesandvines.com/flash. Domestic wine offers only.

Offers by wine type

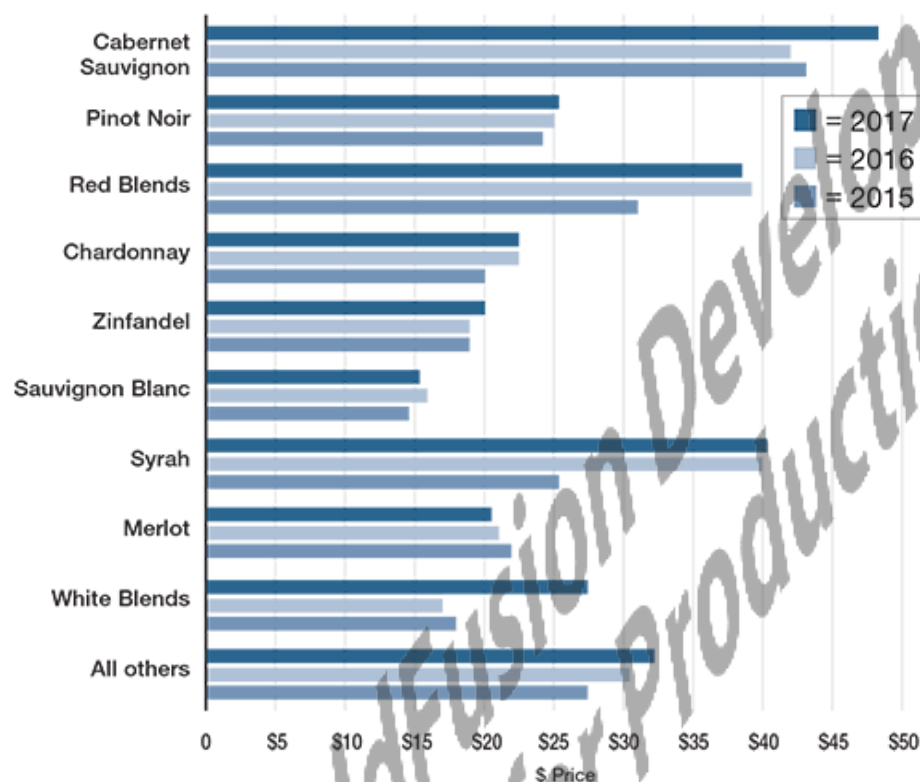
Wines Vines Analytics examined domestic wine offers by varietal or wine type and found that Cabernet Sauvignon is still the most offered wine by flash resellers. Cabernet offers have also remained steady, despite

the decline in the number of offers for wines overall.

Flash resellers made 1,657 offers for Cabernet in the past 12 months and that is 8% larger than during the same period ending July 2016. The number of offers for Pinot Noir during the same period fell 13% from 1,291 in 2016 to 1,117 this year. The number of offers for all other major varieties have also dropped in the past year with the exception of rosé wines that increased by 5% to 85 offers in the past month.

The average flash price for Cabernet Sauvignon also remained the highest in the past 12 months at \$48, which is 13% more than the previous year. The average price for Pinot stayed flat at \$25 and the average for red blends declined by 1%. In 2015, red blends overtook Chardonnay to be the third-most offered wine type by flash resellers but in the most recent 12 months offers slipped by 7% from 948 in 2016 to 880 this year.

FLASH OFFERS BY AVERAGE FLASH PRICE



Source: Wines Vines Analytics, winesandvines.com/flash. Domestic wine offers only.

FLASH SITES COMPARED FOR JULY

Flash Reseller	Number of Domestic Offers	Average Flash Price (750ml)	Average Discount	Visits*
CellarThief	23	\$29.34	43%	<5,000
Cinderella Wine	14	\$41.68	35%	<12,000
Invino	192	\$23.84	43%	50,000
Last Bottle Wines	14	\$22.79	48%	75,000
Last Call Wines	99	\$24.68	48%	<5,000
Wine Spies	33	\$28.89	42%	15,000
Wine Woot	30	\$14.90	50%	243,000
WineAccess Inc.	16	\$37.43	12%	137,000
Wines Til Sold Out	35	\$21.54	56%	105,000
Wired For Wine	12	\$47.06	28%	<12,000

Source: Wines Vines Analytics, winesandvines.com/flash. Domestic wine offers only.
*Source: Visits from SimilarWeb, July 2017.

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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