



WINEMETRICS

2015 Wine Buyer's Report

A Summary of Wine List Insights
For On-Premise Beverage Managers

Introducing Winemetrics' Wine Equity Quotient™ and
Brand Equity Quotient™



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Introduction

This is the inaugural edition of *Winemetrics' Wine Buyer's Report*, our first report designed for the needs of the restaurant beverage buyer and wine professionals that sell to them. Previously, Winemetrics has focused exclusively on providing market intelligence to wine suppliers and distributors

The wine and drink lists used in this report were compiled in the second half of 2014 and with new list data added and updated through Q1, 2015. Over 225 casual, upscale casual and fine-dining chains and restaurant groups, representing over 15,000 accounts nationwide, were surveyed for this report. In many of the larger restaurant groups, we have surveyed multiple chains. As with all of our reports, we limit our survey to lists with fewer than 500 wines by the 750 ml. bottle so as prevent accounts with vast wine selections from skewing our data.

Winemetrics' 2015 Wine Buyer's report supplies a wealth of competitive set information to wine buyers. One of the most frequent issues mentioned by on-premise wine buyers was the lack of competitive information on wine selections. While many wine buyers have access regarding the most popular wines and brands sold off-premise, they had no information regarding which wines and brands were most popular in their specific account type and cuisine. Our 2015 Wine Buyer's Report we offer median wine list content including list size, varietal content, pricing structure and leading brands for 10 different segment (e.g. Upscale Casual Seafood). We also list the leading brands by variety for Casual, Upscale Casual and Fine Dining segments. All distribution is listed both by-the-glass and by-the-bottle.

Also in this inaugural report, we are introducing Winemetrics' Wine Equity Quotient and Brand Equity Quotient which explained in more detail on page

Should you wish to acquire more detailed information about specific US markets or wine varieties, regions or brands, please contact us at info@winemetrics.com.

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About Winemetrics

Winemetrics is the leading source of on-premise wine information and analysis, and provides the most complete, objective wine market intelligence available. The founder of Winemetrics, Charles Gill, has over 30 years of experience at all levels of the wine industry and has been providing on-premise wine distribution analysis to the industry for the past decade.

In addition to our annual reports, Winemetrics provides custom analysis of supplier portfolios via its Trilogy Reports and in-depth analysis of distribution opportunities in specific chains with its Wine List Analysis Reports. For more information and demos of our leading-edge products , please email us anytime at info@winemetrics.com.

Casual Dining Restaurant Chains/Groups Surveyed for this Report

99 Restaurant	Duke's Chowderhouse	Papa Vino's
American Tap Room	Elephant Bar	Pappasitos
Anthony's CF Pizza	Famous Dave's	Phillips Seafood
Axel's Bonfire	Fish City Grill	Plan B Burgers
Bahama Breeze	Flanigan's	Quarterdeck
Bar Louie	Fox & Hound	RA Sushi
Benihana	Giordano's	Rainforest Café
Bertucci's	Gordon Biersch	Ram Brewery
Biaggis	Granite City	Red Lobster
Big River Grille	Hard Rock Café	Red Robin
BJs	Hennessey's	Red Rock Canyon
Black Angus	Hooked on Harry's	Rockbottom
Blue Smoke	Houlihan's	Rockfish Grill
Brass Tap, The	Islamorada	Romano's MG
Brick House	Joe's Crab Shack	Ruby Tuesday
Brixx Pizza	Johnny's Italian Steakhouse	Russo's Pizza
Buca di Beppo	Lazy Dog	Rusty Bucket, The
CA Pizza Kitchen	Lee Roy Selmon	Saltgrass Steakhouse
Cantina Laredo	Logan's Roadhouse	Smokey Bones
Carino's	Lone Star	Spaghetti Warehouse
Carolina Ale House	Longhorn Steakhouse	Stanford's
Carrabbas	Lucille's BBQ	Stir Crazy
Cattlemens	Lucky Strike	Tahoe Joe's
Champps	Marlow's Tavern	Ted's Montana Grill
Charleston's	Miller's Ale House	Texas Land & Cattle
Charlie Browns	Mimi's Café	The Pub
Cheddar's	North	Tommy Bahama
Cheesecake Factory	Not Your Average Joes	Tony Roma's
Chin Chin	O'Charley's	Umami Burger
Claim Jumper	Old Chicago	Uno Chicago Grill
Coastal Flats	Old Spaghetti Factory	Wood N' Tap
Copeland's	Olive Garden	Wood Ranch BBQ
Daily Grill	Original Roadhouse	Yard House
Dos Caminos	Osha Thai	Z Tejas
Duffy's Sports Grill	Outback	

Upscale Casual and Fine Dining Restaurant Chains/Groups Surveyed for this Report

Ark Management	Harry Caray's	Patina Restaurant Group
Back Bay RG	Hillstone Restaurants	Jean-Georges RG
BLT Steak	Hugo's Frog Bar	Perry's Steakhouse
Bluewater Grill	Hyde Park Steakhouse	PF Changs
Bonefish Grill	Il Fornaio	Piatti
BR Guest	J. Alexanders	PJ Clarkes
Bravo Brio RG	J. Gilberts	Quaintance Weaver
Buckhead Life RG	Jax Fish House	RA Sushi
Burton's Grill	Jimmy's American Tavern	Reata
Cameron-Mitchell	Joe's Seafood	Redstone Grill
Capital Grille	Joe's Stone Crab - Miami	Restaurants Unlimited
Catch 35	Joey	Roots Steakhouse
Chart House	Johnny's Italian Steakhouse	Rosa Mexicano
Chuck's Steakhouse	Keg Steakhouse	Roy's
Clyde's Restaurant Group	Kent Rathbun RG	Ruth's Chris
Cordua Restaurants	Kimpton Restaurants	Salt Creek Grille
Crave	Kincaid's	Schwartz Bros.
Del Frisco's Grill	King's Fish House	Seasons 52
Devon Seafood	Kona Grill	Select Restaurant Group
District Chophouse	Landry's Seafood	Shula's
Donovan's Steakhouse	Legal Seafood	Smith & Wollensky's
Eddie Merlot's	LEYE	Spice Market
Eddie V's	Maggianos	Starr Restaurant Group
El Gaucho	Marlow's Tavern	Stefani Restaurant Group
Finn & Porter	Mastro's	Stonewood Grill
Firebirds Grill	McCormick & Schmick's	Strategic Hospitality - Tao
Fishmarket	Melting Pot, The	Striphouse
Flemings	Mike Ditka's	Sullivans
Fogo de Chao	Newport Restaurant Group	Sushi Samba
Fourth Wall Restaurants	Morton's	Tavistock
Francesca's	Nobu	The Chophouse
Gibson's Steakhouse	Not Your Average Joes	The Prime Rib
Grand Central Oyster Bar	Ocean Prime	Think Food Group
Grand Lux	Oceanaire	Truluck's
Great American Restaurants	Old Ebbitt Grill	Union Square Hospitality
Grill on the Alley	Palomino	Village Tavern
Grillsmith	Papa Razzi	Willie G's
Grimaldi's	Pappas Bros. RG	Wolfgang Puck Restaurants
Harris Inn & Ranch	Passion Food Group	

Introducing Winemetrics' Wine Equity Quotient™ (WEQ)

For over a decade, Winemetrics has been providing on-premise wine distribution analysis to the wine industry. Most of this information is based on total numbers of listings in our survey sample which we have used to provide rankings by wine, brand and supplier. While this is certainly a useful value, we believe it only provides a partial picture of the relative strength of a wine or brand on-premise. One of Winemetrics' objectives has been to create a valuation that would more effectively determine a wine's equity on-premise. In addition to total listings for a wine or brand, it would incorporate the quantity and diversity of the chains where it was distributed.

Working in conjunction with a marketing agency specializing in brand equity, we have created an algorithm that will quantify relevant elements of a wine's distribution and deliver a comparable value for each brand's on-premise equity either by-the-glass (BTG) or by-the-bottle (BTB). We have named this value the Wine Equity Quotient (WEQ); there is a WEQ for both BTG and BTB for all wines. A summation of all of the WEQ of a brand results in the Brand Equity Quotient.

The components of the WEQ are:

- a. Total number of listings, which is a measure of the raw total strength of a wine or brand.
- b. Total number of chains, which is a measure of a wine or brand's awareness among wine buyers. It quantifies the acceptance of on-premise gatekeepers and is second only to total listings as a measure of a wine's on-premise equity.
- c. The diversity of a wine's account base is another factor. The more diverse a wine's distribution among Casual, Upscale Casual and Fine Dining chains, the greater its acceptance among a wider group of gatekeepers.
- d. The final factor considered is the average price of the target wine versus the average for the category. The higher the price above the group average, the fewer options available for a product, so higher priced wines usually have higher WEQ.

The resulting WEQ value allows a more complete empirical assessment than the raw total listings currently provided in Winemetrics' report. WEQ and their compilations, the Brand Equity Quotients, will appear in all future Winemetrics Reports.

WEQ sample calculation for selected Pinot Noir wines

Wine	# Listings	# Chains	Ave. Price BTG	WEQ
Mark West Pinot Noir	207	31	\$8.37	45.1
Mirassou Pinot Noir	291	24	7.23	52.7
Meiomi Pinot Noir	152	53	\$12.35	56.6

Top 100 Wines by Wine Equity Quotient (we offer the Top 10 in this excerpt)

Rank	Producer	Variety	# BTG	#Chains	Ave Price	WEQ
1	Chateau Ste. Michelle	Riesling	718	84	\$7.58	180.4
2	Kendall-Jackson	Chardonnay	658	84	\$9.25	156.1
3	Beringer	White Zinfandel	506	69	\$6.21	128.1
4	Sonoma-Cutrer	Chardonnay	187	61	\$13.34	116.7
5	Ecco Domani	Pinot Grigio/Gris	479	44	\$7.14	95.7
6	Santa Margherita	Pinot Grigio/Gris	210	44	\$13.51	80.0
7	J. Lohr	Cabernet Sauvignon	322	37	\$9.80	73.7
8	Sutter Home	White Zinfandel	333	17	\$5.77	67.1
9	Meiomi	Pinot Noir	149	51	\$12.35	56.6
10	Ravenswood	Zinfandel	225	33	\$8.73	54.5

Casual Steakhouse Overview

Winemetrics provides actionable information for wine buyers (and representatives) on the pricing, variety and brand profiles of each segment of the on-premise market. Below is our analysis of the Casual Steakhouse

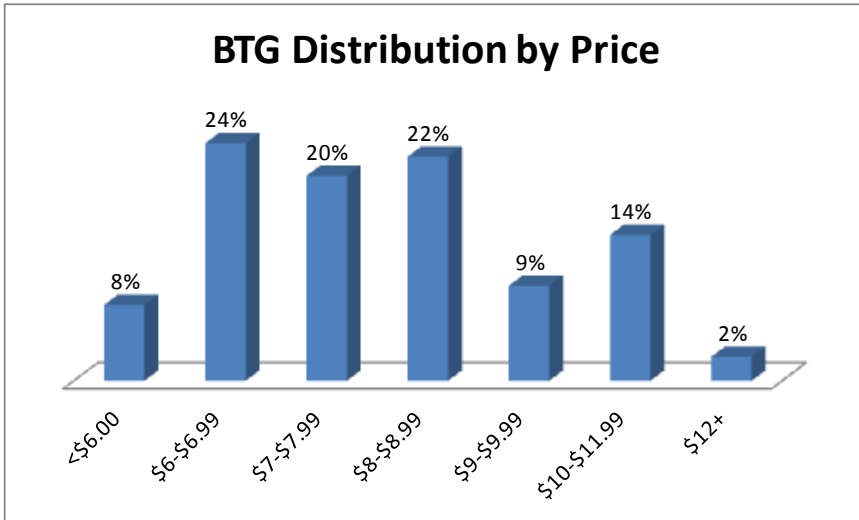
Casual Steakhouse	Ave. # BTG	Ave. Price BTG	Ave # BTB	Ave. Price BTB
	18	\$7.89	24	\$33.96

Casual Steakhouse Chain List

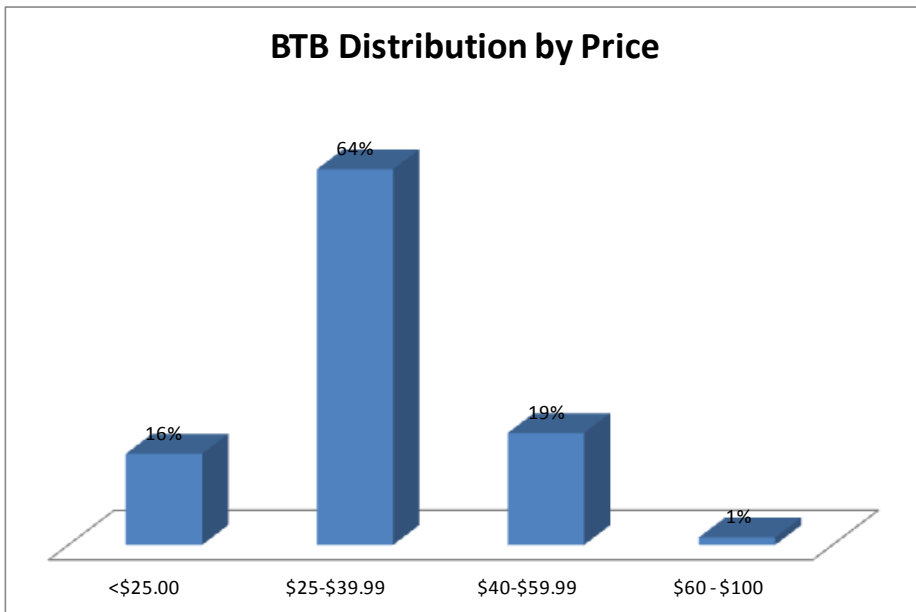
Black Angus	Lone Star	Ted's Montana Grill
Cattlemens	Longhorn Steakhouse	Texas Land & Cattle
Charlie Browns	Outback	
Claim Jumper	Saltgrass Steakhouse	

Casual Steakhouse Distribution by Price

BTG Distribution by Price

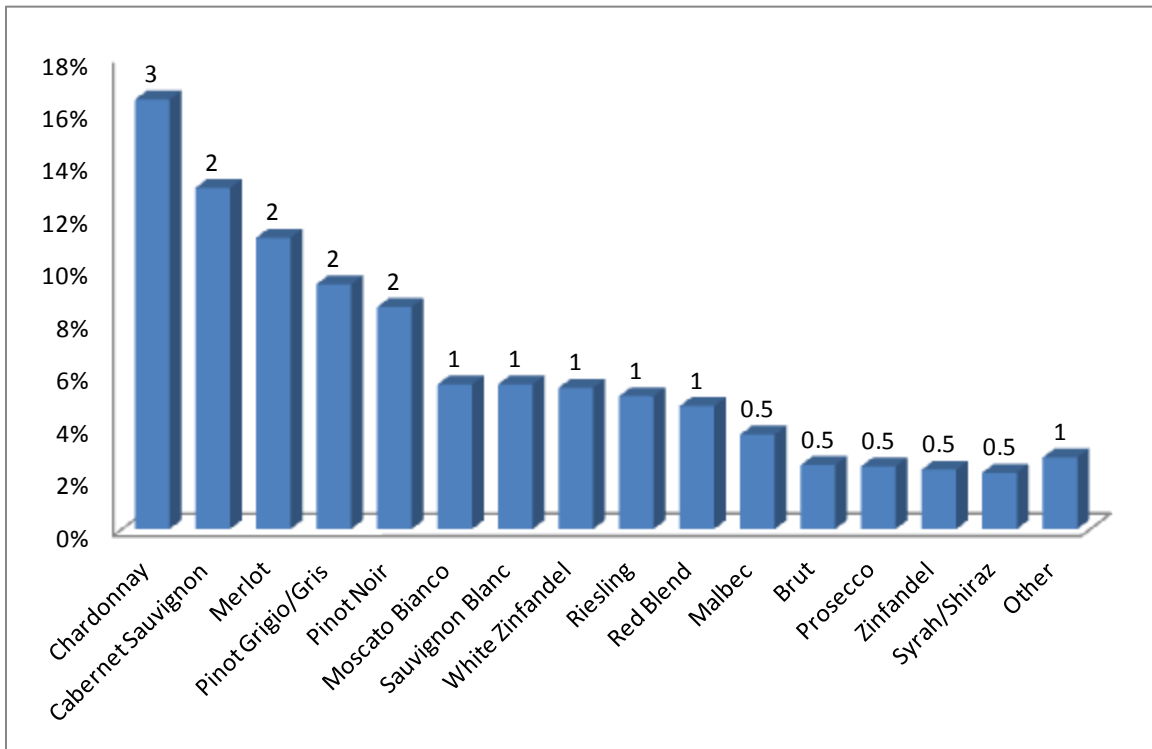


BTB Distribution by Price

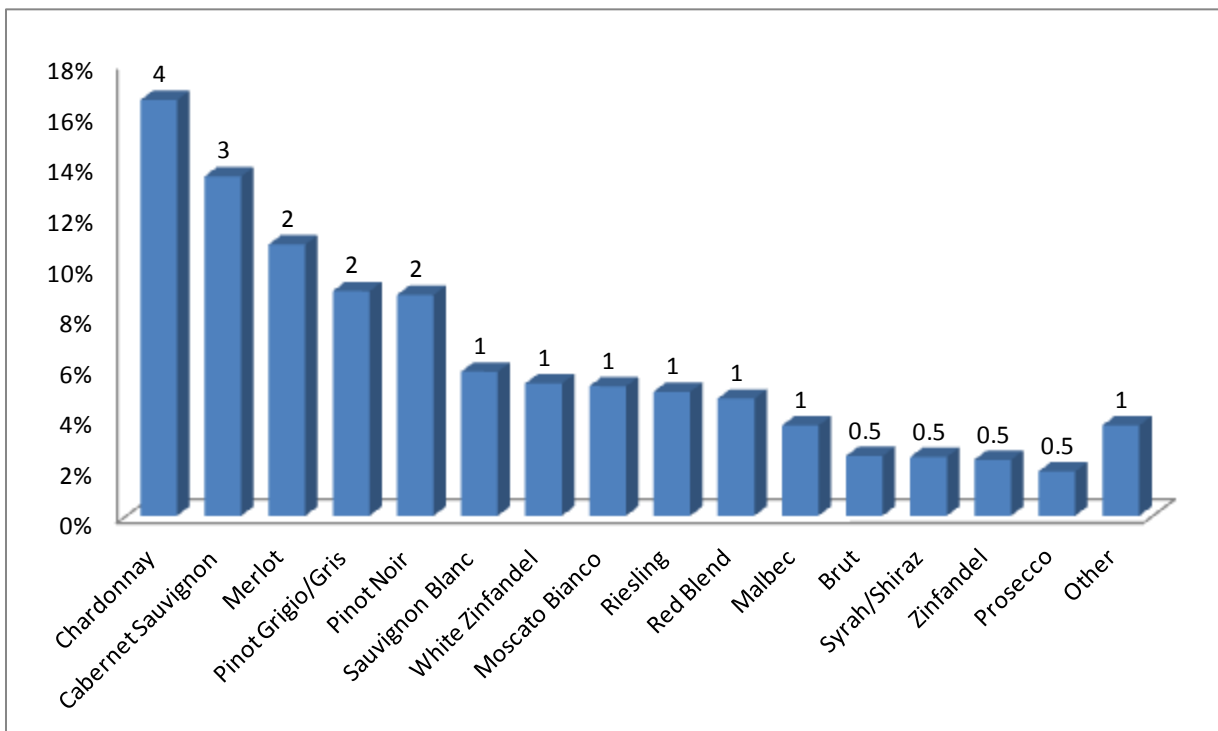


Casual Steakhouse Variety Profile BTG

Our Variety Profile Graphs list overall percentages by leading varieties and number of listing by variety on an average list for the segment.



Casual Steakhouse Variety Profile BTG



Casual Steakhouse Leading Producers – BTG and BTB

Producer	Variety	# BTG	Ave. \$ BTG	Rank	Producer	Variety	# BTB	Ave. \$ BTB
Kendall-Jackson	Chardonnay	146	\$9.22	1	Kendall-Jackson	Chardonnay	146	\$35.75
Chateau Ste. Michelle	Riesling	135	\$7.01	2	Chateau Ste. Michelle	Riesling	135	\$26.60
Ecco Domani	Pinot Grigio/Gris	134	\$7.11	3	Ecco Domani	Pinot Grigio/Gris	134	\$25.90
Red Diamond	Merlot	128	\$7.68	4	Red Diamond	Merlot	128	\$29.33
J. Lohr	Cabernet Sauvignon	88	\$9.49	5	J. Lohr	Cabernet Sauvignon	88	\$34.50
Sutter Home	White Zinfandel	84	\$5.83	6	Coppola, Francis	Cabernet Sauvignon	82	\$38.00
Mirassou	Pinot Noir	81	\$8.25	7	Mirassou	Pinot Noir	81	\$31.50
14 Hands	Cabernet Sauvignon	80	\$6.38	8	14 Hands	Cabernet Sauvignon	80	\$26.50
Alamos	Malbec	80	\$7.63	9	Alamos	Malbec	80	\$30.00
Coppola, Francis	Cabernet Sauvignon	77	\$10.95	10	Columbia Crest	Chardonnay	77	\$33.00
Little Boomey	Cabernet Sauvignon	77	\$6.25	11	Jacob's Creek	Moscato Bianco	77	\$25.00
Columbia Crest	Chardonnay	77	\$8.75	12	Campanile	Pinot Grigio/Gris	77	\$31.00
Little Boomey	Chardonnay	77	\$6.25	13	La Marca	Prosecco	77	\$31.00
Jacob's Creek	Moscato Bianco	77	\$4.00	14	Dreaming Tree, The	Red Blend	77	\$41.00
Campanile	Pinot Grigio/Gris	77	\$8.25	15	Clos du Bois	Sauvignon Blanc	77	\$31.00
Dreaming Tree, The	Red Blend	77	\$10.95	16	Jacob's Creek	Syrah/Shiraz	77	\$36.00
Clos du Bois	Sauvignon Blanc	77	\$8.25	17	Beringer	White Zinfandel	59	\$22.80
Jacob's Creek	Syrah/Shiraz	77	\$9.50	18	Carnivor	Cabernet Sauvignon	55	\$32.33
Beringer	White Zinfandel	59	\$5.80	19	Franciscan	Cabernet Sauvignon	53	\$49.67
Carnivor	Cabernet Sauvignon	55	\$8.33	20	Beringer	Cabernet Sauvignon	52	\$31.67
Beringer	Cabernet Sauvignon	52	\$8.16	21	Mondavi Private Selection	Cabernet Sauvignon	51	\$28.50
Mondavi Private Selection	Cabernet Sauvignon	51	\$7.64	22	Wild Horse	Pinot Noir	51	\$40.00
Wild Horse	Pinot Noir	51	\$10.40	23	Woodbridge	Cabernet Sauvignon	46	\$26.00
Franciscan	Cabernet Sauvignon	46	\$12.49	24	Canyon Road	Chardonnay	46	\$23.00
Woodbridge	Cabernet Sauvignon	46	\$6.79	25	Meridian	Chardonnay	46	\$27.00
Canyon Road	Chardonnay	46	\$5.99	26	Red Rock	Malbec	46	\$28.00
Meridian	Chardonnay	46	\$6.99	27	14 Hands	Merlot	46	\$25.00
Red Rock	Malbec	46	\$7.29	28	Turning Leaf	Merlot	46	\$23.00
14 Hands	Merlot	46	\$6.49	29	14 Hands	Moscato Bianco	46	\$30.00
Turning Leaf	Merlot	46	\$5.99	30	Trinity Oaks	Pinot Noir	46	\$26.00
14 Hands	Moscato Bianco	46	\$7.79	31	Mondavi Private Selection	Sauvignon Blanc	46	\$27.00
Trinity Oaks	Pinot Noir	46	\$6.79	32	Sonoma-Cutrer	Chardonnay	18	\$44.40
Mondavi Private Selection	Sauvignon Blanc	46	\$6.99	33	Blackstone	Merlot	17	\$26.33
Blackstone	Merlot	17	\$6.83	34	Clos du Bois	Chardonnay	14	\$29.00
Clos du Bois	Chardonnay	13	\$7.63	35	Rancho Zabaco	Zinfandel	14	\$32.00
Darkhorse	Cabernet Sauvignon	9	\$6.50	36	Alexander Valley Vineyards	Cabernet Sauvignon	9	\$41.00
William Hill	Chardonnay	9	\$7.50	37	Darkhorse	Cabernet Sauvignon	9	\$25.00
Cavit	Moscato Bianco	9	\$7.00	38	William Hill	Chardonnay	9	\$29.00
Rancho Zabaco	Zinfandel	9	\$8.00	39	Rodney Strong	Merlot	9	\$33.00
Korbel	Brut	8	\$8.00	40	Cavit	Moscato Bianco	9	\$27.00
Estancia	Cabernet Sauvignon	8	\$8.00	41	Meiomi	Pinot Noir	9	\$42.00