



WINEMETRICS



Winemetrics 2009 National Accounts Report

Introduction

About Winemetrics

Winemetrics LLC supplies on-premise market research and productivity analysis to the wine and hospitality industries. The team at Winemetrics has over 30 years of experience at all levels of the wine industry and designed the Wineosaur™ system for on-premise wine distribution management.

Winemetrics provides the next level of on-premise wine distribution management, offering brand management consulting and information services to wine suppliers and distributors. Additionally, we offer wine list analysis services to the restaurant industry. For more information and demos of our products, please visit our website at www.winemetrics.com or email us at info@winemetrics.com.

Winemetrics National Account Report

The main goal of our National Account Report is to provide suppliers with the essential wine list analysis to create effect presentations to national and regional restaurant groups. Our report, which is delivered on CD-ROM, provides analysis of core wine lists based on averages for the segment. In the following sample report, Bertucci's (a 90-unit MA-based casual Italian chain) wine list is compared to all other casual Italian wine lists in our database. Comparisons are based on varietal content, country of origin and price structure and recommendations are provided based on significant variations from the segment average.

Over 200 chains/multi-concept restaurant groups are analyzed in our report, encompassing over 300 wine lists and 1000 pages of data. Due to its extensive size, the reports are provided in PDF and Excel format on a CD-ROM for ease of access and utilization in internal reports. Winemetrics National Account Report is priced at \$3990 (less than \$20 per restaurant group) and can be purchased at www.winemetrics.com.

List of Restaurant Wine Lists Analyzed in Winemetrics National Accounts Report

Restaurant Group	# Units	Restaurant Group	# Units	Restaurant Group	# Units
Anderson Restaurant Group	7	Fuzio	9	Pappadeaux Seafood Kitchens	30
Bahama Breeze	23	Gallagher's Steakhouse	6	Pasta Pomodoro	30
Bar Louie	43	Gordon Biersch	27	Pastini Pastaria	8
Benihana	72	Grand Lux Café	12	Patsy Grimaldi's	6
Bertucci's	92	Granite City Food & Brewer	22	PB&J Restaurants	14
Biaggi's	21	Heart of America Rest. Inc	17	PF Chang's China Bistro	144
Bice Group	8	Houston's	39	Peppino's	5
Big Time Restaurants	7	Houlihans	105	Phillip's Seafood	10
BJ's Brewhouse	70	Hyde Park Restaurants	12	Piatti	12
Black Angus Steakhouses	77	Il Fornaio	22	Plaza III Steakhouse	6
Bobby Van's Steakhouse	7	Islamorada Fish Company	24	Ram Brewery	16
Bob's Steak & Chophouse	5	Ivar's	3	Red Lobster	651
Bonefish Grill	125	J. Alexanders	29	Redrock Canyon Grill	7
Boulder Creek Steakhouses	7	Joe's American Bar & Grill	14	Redstone American Grill	5
Bravo Cucina Italiana	43	Joey's	4	Rock Bottom Restaurants	130
Brigantine	6	Carino's Italian Grill	124	Rockfish Seafood Grill	14
Brio Tuscan Grille	27	Keg Steakhouse	17	Romano's Macaroni Grill	202
Buca di Beppo	90	Kent Rathbun Restaurants	7	Roy's	34
Bugaboo Creek Steakhouse	31	Kincaid's	10	Ruby Tuesday's	882
Butcher Shop Steakhouses	4	King's Fish House	12	Ruth's Chris Steakhouse	114
CA Pizza Kitchen	180	Kirby's Steakhouse	5	Salt Creek Grille	5
California Café	6	Kona Grill	18	Saltgrass Steakhouse	40
Cameron Mitchell	26	Landry's Seafood	24	Scott's Seafood	6
Canyon's Restaurant	4	Lark Creek Restaurant Grou	8	Seasons 52	7
Capital Grille	32	Lawry's	8	Shula's	24
Carraba's	240	Legal Seafood	36	Sisley Kitchen	5
Cattleman's Steakhouse	8	Lettuce Entertain You	62	Spaghetti Warehouse, The	21
Cedar Creek Inn	3	Levy Restaurants	25	Spark Woodfire Grill	3
Champps	60	Longhorn Steakhouse	296	Stanford's	10
Charlie Brown's	54	Louise's Trattoria	8	Stonewood Grill & Tavern	17
Chart House	27	Mackay Restaurant Group	7	Stoney River Legendary Steak	7
Cheesecake Factory	140	Maggiano's	41	Sullivan's Steakhouse	16
Chin Chin	6	Market Broiler	5	Napa Valley Grille	6
Chophouse, The	16	Market City Caffè	5	Ted's Montana Grill	56
Chuck's Steakhouse	14	Marmalade Café	10	Texas de Brazil	14
Claim Jumper	45	McCormick & Schmick's	75	Texas Land & Cattle	31
Clyde's	12	McGrath's Fish House	20	Tony Roma's	54
Consolidated Rest. Operator	12	Melting Pot, The	87	Tommy Bahama's	12
Copeland's	22	Mimi's Café	130	Trader Vics	9
Craft	8	Mitchell's	19	Trastevere	4
Daily Grill	24	Morton's of Chicago	73	Truluck's	8
Dave & Buster's	50	Newport Bay	7	TS Restaurants	12
Del Frisco's	7	Nobu	13	Typhoon	7
Duke's Chowder House	6	Not Your Average Joe's	17	Uno Chicago Grill	144
E Brands Restaurants	13	Oceanaire	14	Village Tavern	9
Elephant Bar & Restaurant	47	Old Spaghetti Factory	37	Weber Grille Restaurants	4
Firebirds Rocky Mtn. Grill	15	Olive Garden	670	Wildfire Steakhouse	8
Fishmarket	8	Outback Steakhouse	790	Wood Ranch BBQ	13
Flanigan's	22	Paesanos Restaurant Group	6	Yardhouse	18
Fleming's	45	Palm Steakhouses	26	Zios Italian	15
Fogo de Chao	12	Palomino	10	Z-Tejas	10
				Total	7911

Sample Report

Bertucci's – Casual Italian Segment



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National Account Navigator Report

Account Name: Bertucci's
Corporate Ownership: Bertucci's Corp.
Account Type: Casual
Cuisine: Italian
Unit Type: Regional Chain
Total # Units (2008): 94
Concepts/# Units/States:
 CT - 12 MA - 42 NJ - 7 RI - 1
 DC - 2 MD - 6 NY - 3 VA - 7
 DE - 2 NH - 3 PA - 9

Competitive Set

Casual Italian

Account Name:	Average # Unique Wines	Variability between Units*
Bertucci's	24	Low
Buca Di Beppo	37	
Carino's Italian Grill	26	
Carrabba's	40	
Louise's	31	
Olive Garden	38	
Pasta Pomodoro	15	
Average List Size	30	

* Low - wine lists nearly identical throughout the chain
 Moderate - wine lists may vary up to 25% between unit
 High - Lists may vary more than 25% between units

Wine List Type

Progressive

Wine List Special Features:

All wines served by bottle are also served by the glass. Half carafe used for 4 least expensive selections.
 No half bottles listed or wine flights.

Distribution Opportunities (based on category average)

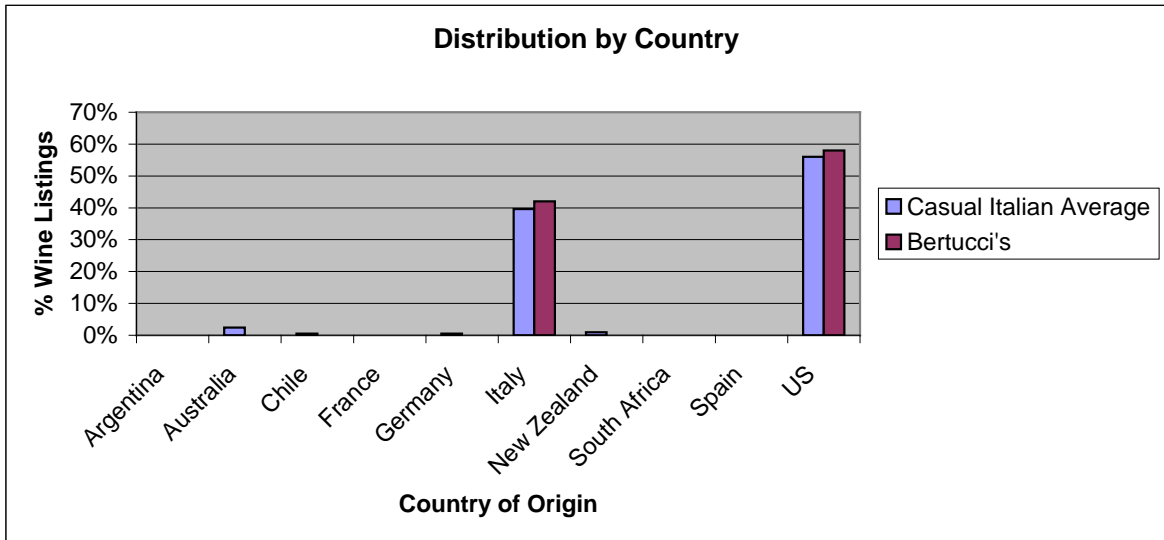
1. Add a Riesling and a Corvina Blend (Valpolicella/Amarone)
2. Add a NZ Sauvignon Blanc or Argentina Malbec (other Casual Italian chains have them)
3. Add several wines above \$40 point, allowing customers to trade up

Bertucci's

Sample Report Continued

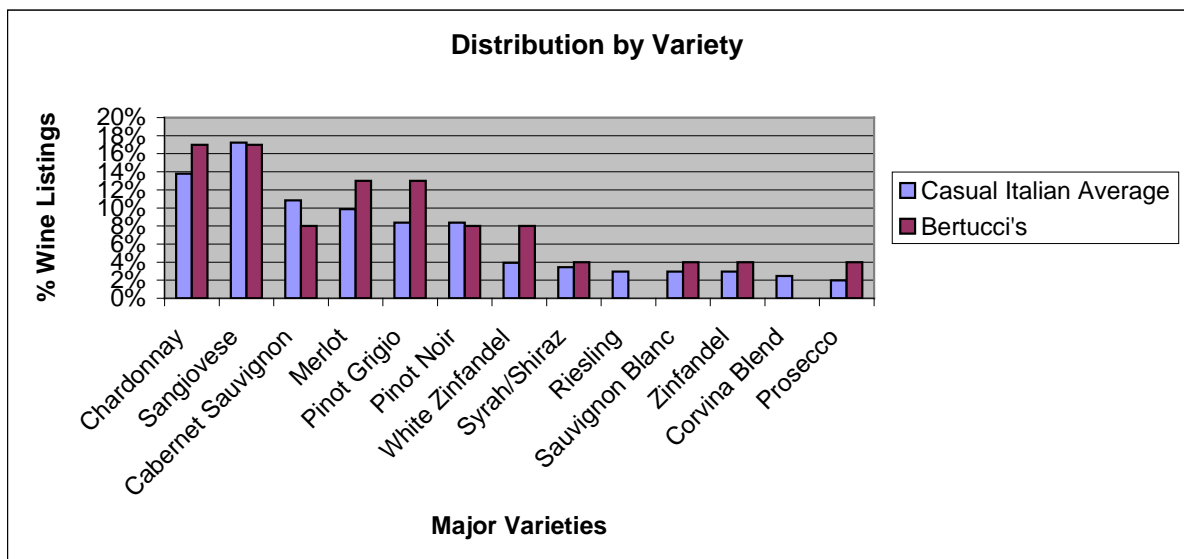
Country of Origin Profile

(Compared against Casual Italian Average)



Variety Profile

(Compared against Casual Italian Average)



Bertucci's Sample Report End

Pricing Profile

(Compared against Casual Italian Average)

