



WINE INTELLIGENCE

PORTUGAL: COVID-19 IMPACT REPORT

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INTRODUCTION



Like in most areas of the world, Portuguese wine industry professionals and wine consumers are experiencing the first-hand effects of Coronavirus, causing everyone to adapt to a 'new normal' when it comes to wine.

Whilst certain markets, such as the UK or France, are experiencing increases in their typical frequency of wine consumption, the story is different when it comes to Portugal. Despite wine consumption frequency in Portugal remaining relatively stable prior to the Covid-19 crisis, both wine consumption frequency and typical spend per bottle has fallen since the lockdown. All at-home wine drinking occasions have seen declines in stated wine consumption frequency, especially for formal, social occasions, likely due to the restrictions imposed on social gatherings. Nevertheless, Portuguese wine consumers seem to have taken a liking to 'lockdown-specific' occasions for wine drinking, with over half of consumers enjoying

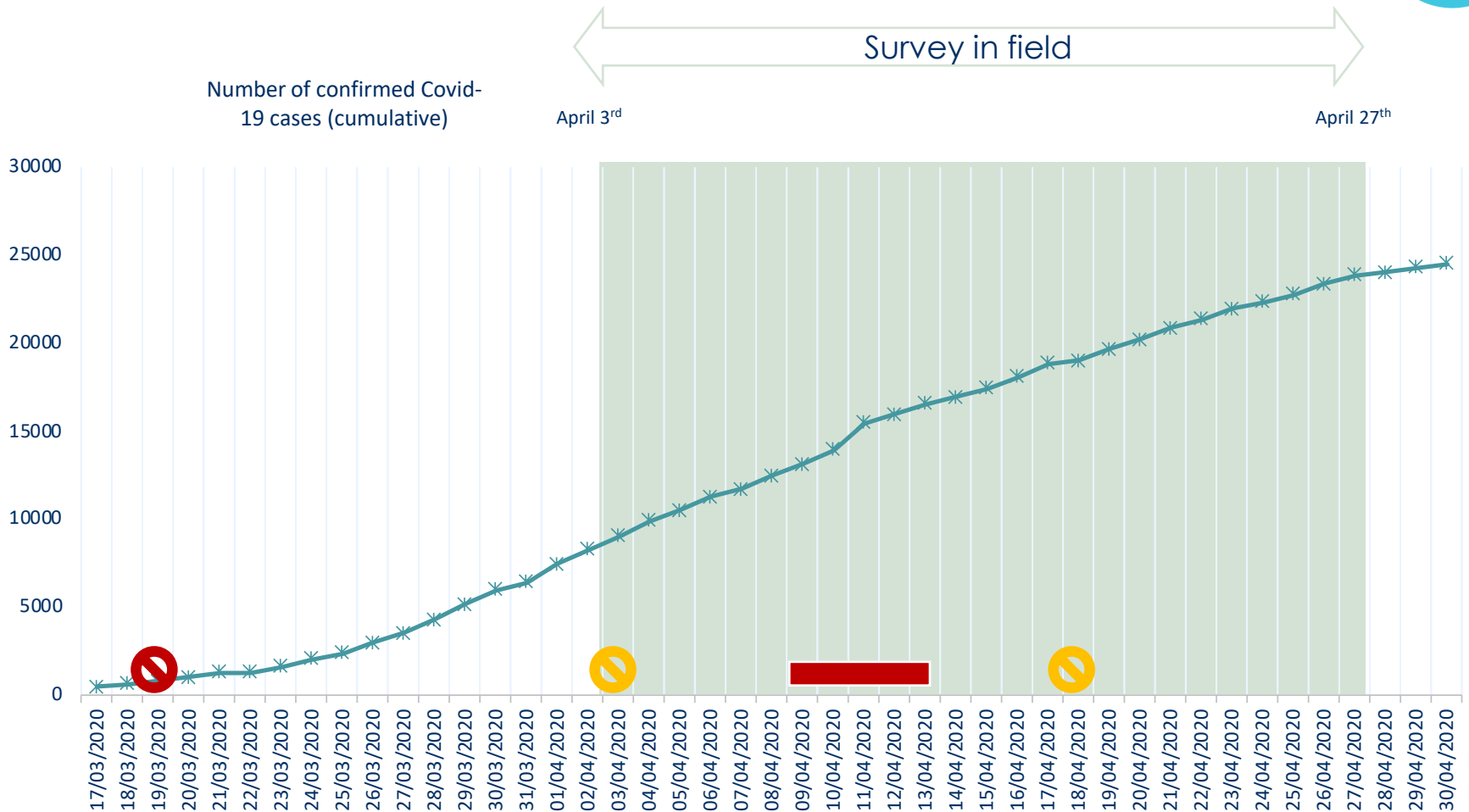
drinking wine at least once a week during the 2020 lockdown period – particularly whilst having lunch / dinner at home or whilst having a better than usual evening meal with their families / partners.

As one can imagine, online wine-buying channels have been the biggest winner of the lockdown, with the desirable, younger, affluent wine drinkers leading the way for internet purchasing.

During these uncertain times, it is understandable that Portuguese wine drinkers are cautious of socialising, going out, and travelling in the future. However, there is a silver lining. Positively for the wine category, many Portuguese wine consumers do look forward to treating themselves to better quality wine post-lockdown.

Luis Osorio, May 2020

TIMELINE CONTEXT DURING SURVEY DATA COLLECTION – PORTUGAL



State of emergency declared: The entirety of the Portuguese territory in a State of Emergency for the next 15 days. All public events are cancelled. People are expected to stay at home except for a number of essential reasons (eg grocery shopping)

State of emergency extended for an additional 15 days

No one is allowed to leave their home municipality during Easter break

Source: <https://www.who.int/emergencies/diseases/novel-coronavirus-2019/situation-reports/> (updated: 12.05.2020)

RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Portugal in April 2019, October 2019 and April 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of Portuguese regular wine drinkers in terms of gender and age

The distribution of the sample is shown in the table

| | | <i>Apr-19</i> | <i>Oct-19</i> | <i>Apr-20</i> | |
|---------------|--------------|---------------|---------------|---------------|-------------|
| | | <i>n=</i> | <i>1000</i> | <i>1405</i> | <i>1001</i> |
| Gender | Male | 56% | 56% | 56% | |
| | Female | 44% | 44% | 44% | |
| | Total | 100% | 100% | 100% | |
| Age | 18-24 | 2% | 2% | 2% | |
| | 25-34 | 13% | 13% | 13% | |
| | 35-44 | 19% | 19% | 19% | |
| | 45-54 | 20% | 20% | 20% | |
| | 55-64 | 19% | 19% | 19% | |
| | 65 and over | 27% | 27% | 27% | |
| Total | | 100% | 100% | 100% | |

Source: Wine Intelligence Vinitrac® Portugal, Apr '19, Oct' 19, Apr '20 (3rd April 2020 – 27th April 2020), n>= 1,000 Portuguese wine drinkers

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