



WINE INTELLIGENCE

# US: COVID-19 IMPACT REPORT

[Issue #1]

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# CONTENTS



- 05** **Introduction**
  - Timeline context during survey data collection
  - Segment definitions
  - Management summary & key takeaways
  
- 25** **Category behavior during Covid-19 lockdown**
  - Change in category purchase quantity
  
- 31** **Overall frequency of wine consumption during Covid-19 lockdown**
  - Wine consumption frequency
  
- 37** **Off-premise (at-home) frequency and spend by occasion during Covid-19 lockdown**
  - Off-premise wine consumption frequency:
    - By occasion
  - Off-premise wine consumption frequency change:
    - By occasion
  - Off-premise spend on wine by occasion
  - Off-premise spend on wine change by occasion
  - Wine consumption frequency at specific occasions during lockdown
  
- 51** **Purchase channels for wine during Covid-19 lockdown**
  - Channel usage
  - Change in channel usage
  - Who has switched to online wine purchasing?
  
- 59** **On-premise frequency and spend by occasion pre Covid-19 lockdown**
  - On-premise wine consumption frequency by occasion
  - On-premise spend on wine by occasion
  
- 62** **Country of origin purchase and trust during Covid-19 lockdown**
  - Country of origin awareness and consumption pre lockdown
  - Country of origin change in purchase
  - Country of origin change in trust
  
- 70** **Lifestyle behaviors pre and post Covid-19 lockdown**
  - Lifestyle behavior pre Covid-19 impact
  - Change in lifestyle behavior anticipated after virus restrictions have ended
  - Future behavior priorities
  
- 97** **Research methodology: Quantitative**

# INTRODUCTION

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It is becoming apparent that the wine category may escape the punishment meted out to the travel and hospitality sectors by the coronavirus pandemic. Throughout lockdown, consumers were still enjoying a glass of wine at the end of a long day of Zoom calls and home schooling (and occasionally during the day).

Having seen a substantial increase in sales at the start of the pandemic, volumes of wine sold through the checkout and online have come back to close to pre-pandemic levels. As has been reported extensively elsewhere, the online channel has been the big winner of the lockdown, with the desirable younger, affluent and urban-dwelling wine drinkers leading the way.

More generally, the evidence from this report is that the surge of wine purchased in March and early April has in fact been consumed - through increased frequency of wine drinking generally, and by the invention of new wine drinking moments. As well as the usual with-food occasions, wine has become part of many of the new non-food occasions – for instance catching up with friends online, pre-dinner drinks that start earlier, or even a virtual wine tasting.

It is probably no coincidence that those consumers who have become closer with their wine are those who were closest to it already. Our Portrait consumer segment of Engaged Explorers have been the most enthusiastic

adopters of wine with more meals (including lunch) and the typical Premium Brand Suburban, already the most frequent drinker, is now consuming wine on at least 4 occasions per week.

Another behavior change that shines through in this report is the urge to buy local. Domestic wines are the biggest winners from lockdown in the US market, with both purchase frequency and trust levels falling for imports – especially wines from Europe.

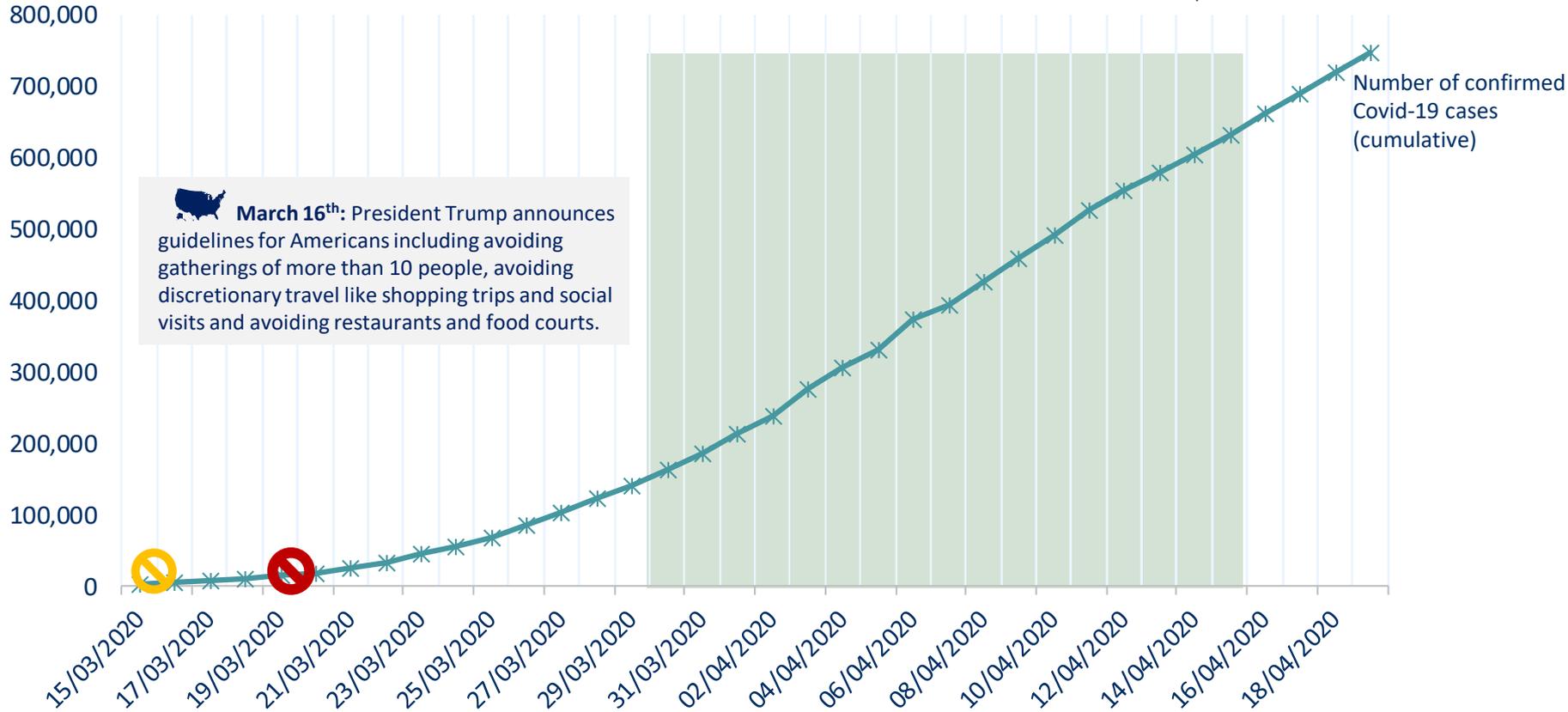
Finally, when it comes to the future, the US wine drinker is understandably quite cautious about their household finances and the idea of getting on a plane. Thankfully for the wine category, they appear to be channeling their need for adventure and indulgence into trying new food and drink, including treating themselves to better wine.

Lulie Halstead, May 2020

# TIMELINE CONTEXT DURING SURVEY DATA COLLECTION – ALL USA



Survey in field  
March 30<sup>th</sup> April 16<sup>th</sup>



**March 16<sup>th</sup>:** President Trump announces guidelines for Americans including avoiding gatherings of more than 10 people, avoiding discretionary travel like shopping trips and social visits and avoiding restaurants and food courts.

**Closure of places of social gathering and on-premise consumption begin:**

- March 15<sup>th</sup>: California, Illinois
- March 16<sup>th</sup>: New York
- March 17<sup>th</sup>: Florida
- March 19<sup>th</sup>: Texas
- March 23<sup>rd</sup>: Pennsylvania

**Stay-at-home order enforced for entire state\*:** Leaving the house only allowed for essential shopping, medical needs, exercise and for work

- March 19<sup>th</sup>: California
- March 20<sup>th</sup>: New York, Illinois
- April 1<sup>st</sup>: Florida, Pennsylvania
- April 2<sup>nd</sup>: Texas

\*Many counties within states had their own policies regarding restrictions and stay-at-home orders, meaning certain areas were affected earlier than these dates

# RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in the US in October 2019 and March 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-premise or in the on-premise

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

The data is representative of US regular wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table

		<i>October 2019</i>	<i>March 2020</i>
		<i>n=</i>	
Gender	Male	51%	51%
	Female	49%	49%
	<b>Total</b>	<b>100%</b>	<b>100%</b>
Age	21-24	7%	9%
	25-34	21%	19%
	35-44	18%	18%
	45-54	15%	19%
	55-64	16%	16%
	65 and over	22%	19%
	<b>Total</b>	<b>100%</b>	<b>100%</b>
Region	New England	5%	5%
	Middle Atlantic	15%	15%
	East North Central	11%	11%
	West North Central	6%	7%
	South Atlantic	21%	21%
	East South Central	4%	4%
	West South Central	11%	11%
	Mountain	7%	7%
	Pacific	20%	19%
	<b>Total</b>	<b>100%</b>	<b>100%</b>

Source: Wine Intelligence Vinitrac® US, Oct '19, Mar '20 (31st March 2020 – 16th April 2020), n>=2,000 US regular wine drinkers

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