

US: COVID-19 IMPACT REPORT

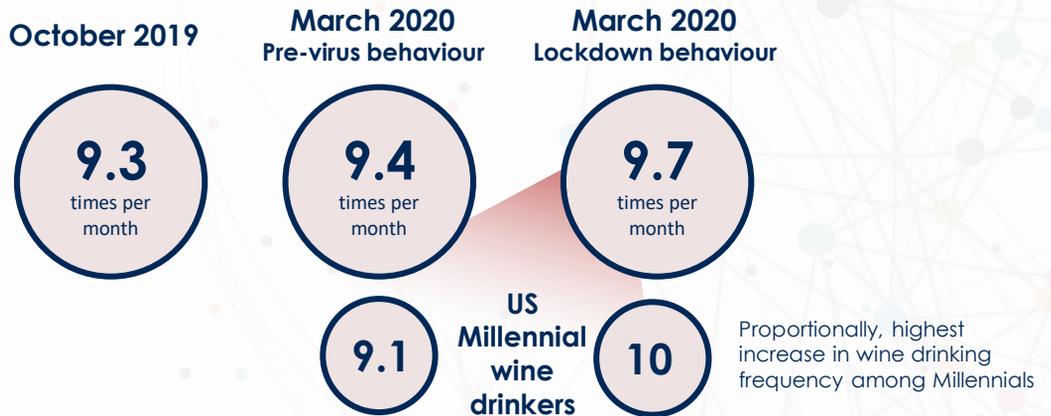
Issue #1, May 2020



HOW US CONSUMERS' SOCIAL, SHOPPING, DRINKING AND WINE LIVES HAVE AND WILL BE CHANGED

AVERAGE NUMBER OF WINE DRINKING OCCASIONS AMONG US REGULAR WINE DRINKERS

Wine consumption rose during lockdown, at-home occasions more than compensated for loss in on-premise



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

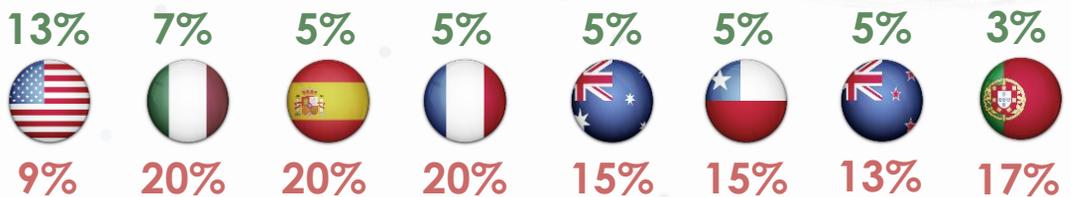
CHANGE IN PURCHASE OF WINE BY COUNTRY OF ORIGIN

Active purchase of US produced wine vs. imported wine rose during lockdown

% who have changed their purchase behavior of wine from each place due to the impacts of Coronavirus
Base = Those who are aware of each place

"I am actively buying more wine from this place"

"I am actively buying less wine from this place"



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

DECREASED WINE SPEND FOR KEY AT-HOME OCCASSIONS

Spend on wine reduced for key occasions compared with pre-lockdown spend

Indexed change in spend on wine drinking at each occasion during lockdown impact
Base = Those who drink wine on each occasion



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

ANTICIPATED FUTURE ACTIVITIES POST LOCKDOWN

Americans expect that they will increase their alcoholic beverage consumption and socialize both in and out of the home less frequently than they did pre-lockdown

% who are more or less likely to do the following activities when the danger of Coronavirus has passed and normal activities are permitted
Base = All US regular wine drinkers (n=2,000)



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

ANTICIPATED FUTURE PRIORITIES

Change in priorities for the following activities once the danger of Coronavirus has passed



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

ABOUT THE REPORT

Built using data collected in late March and early April 2020, this report features insights from 2019 and 2020 pre, during and predicted post lockdown behaviour including

- Changes in purchase and consumption of alcohol beverage categories
- Changes in wine drinking frequency and spend by occasion
- Wine purchase channel change – featuring profiling of 'new' online wine purchasers
- Lifestyle behaviours during and predicted-post lockdown, including future priorities

OTHER COVID-19 IMPACT REPORT MARKETS:

Australia, UK, Portugal, France, China, Canada, South Korea, Sweden, Japan, Netherlands, Germany



PRICING:

With data table:

2,600 USD | 2,000 GBP | 3,800 AUD | 2,400 EUR
4 credits

Without data table:

2,000 USD | 1,500 GBP | 2,900 AUD | 1,800 EUR
3 credits

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