

CANADA: COVID-19 IMPACT REPORT

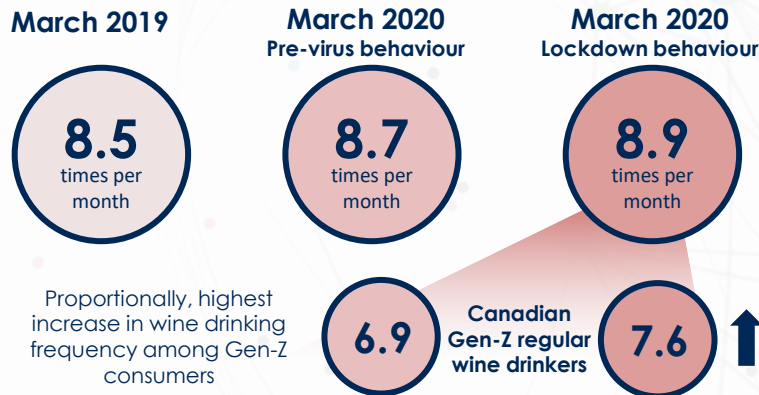
Issue #1, June 2020



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

AVERAGE NUMBER OF WINE DRINKING OCCASIONS AMONG CANADIAN WINE DRINKERS

During lockdown, Canadian drinkers showed a slight increase in overall consumption frequency, with new at-home occasions compensating for the loss of out-of-home drinking occasions



Source: Wine Intelligence Vinitrac® Canada, Mar '20 (31st March 2020 – 20th April 2020), n=2,395 Canadian regular wine drinkers

CHANGE IN CHANNEL USAGE

Canadian drinkers shopped broadly in a similar fashion in mainstream stores, and they increased their purchase rates via online channels where this was available to them

Indexed change in channel usage due to the impact of Coronavirus



Source: Wine Intelligence Vinitrac® Canada, Mar '20 (31st March 2020 – 20th April 2020), n=2,395 Canadian regular wine drinkers

PER BOTTLE SPEND ON WINE DURING LOCKDOWN

Spend per bottle showed a decline across all wine drinking occasions during lockdown

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

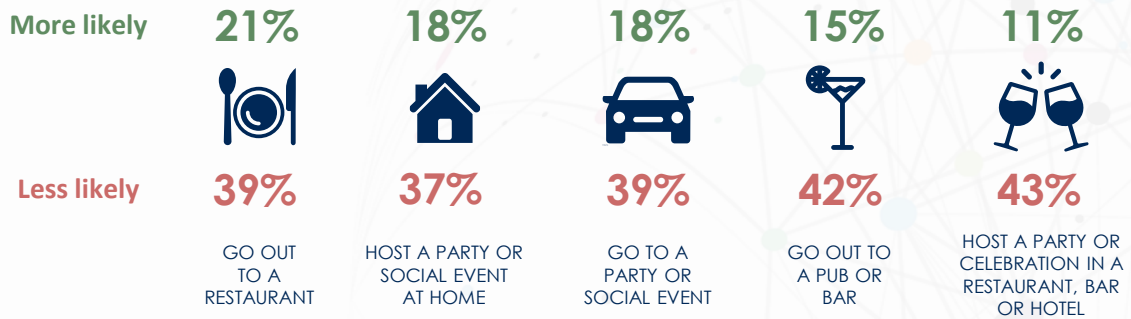


Source: Wine Intelligence Vinitrac® Canada, Mar '20 (31st March 2020 – 20th April 2020), n=2,395 Canadian regular wine drinkers

ANTICIPATED FUTURE SOCIALISING POST LOCKDOWN

Canadian consumers are much more cautious about socializing and leaving the home after 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 Canadian regular wine drinkers (n=2,395)



Source: Wine Intelligence Vinitrac® Canada, Mar '20 (31st March 2020 – 20th April 2020), n=2,395 Canadian regular wine drinkers

ANTICIPATED FUTURE PRIORITIES

Canadian wine consumers anticipate focusing more on both saving while indulging in treats such as trying new styles of food and treating themselves to better quality wine

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



Source: Wine Intelligence Vinitrac® Canada, Mar '20 (31st March 2020 – 20th April 2020), n=2,395 Canadian regular wine drinkers

ABOUT THE REPORT

Built using data collected in 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
- New attitudinal segmentation analysis

OTHER COVID-19 IMPACT REPORT MARKETS:

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

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