

# WINE CONSUMER TRENDS IN THE COVID-19 ERA

AUSTRALIA, CANADA, CHINA, GERMANY, SWEDEN, US & UK

In many key markets, wine continues to be a 'beneficiary' of lockdown and restrictions, with consumers increasingly enjoying wine across a broader range of at-home occasions. Based on our latest set of data, collected in August 2020 amongst regular wine drinkers in a number of key wine markets, 12 key wine consumer trends of the Covid-19 era emerge

Growth in wine consumption frequency

Heartland wine drinkers driving growth

Non-food occasions driving wine growth

Slow recovery in average bottle spend on wine in off-premise

E-commerce for wine comes of age

Shift to wines seen as a safe choice and 'localism'

Consumers increasingly cautious in their lifestyles

Large scale events off the agenda

Travel plans remain on hold

Consumers becoming more distant from on-premise

Treat-seeking behavior losing momentum

US wine market returns to growth

## This report analyses insights including:

- Changes in attitudes and behaviours in wine consumption, including purchase frequency, wine occasions, spend by occasion and purchase channels
- Profiling of who is driving changes for each trend
- Wine consumer segmentation based on anticipated future behaviour
- Current feelings about everyday activities and safety measures
- Future priorities and behaviour for spend, travel, lifestyle habits, etc

## Insights are reported for each market by:

- Age cohorts (Gen Z, Millennials, Gen Z, Boomers)
- Gender
- Wine involvement

## 93-page multimarket report

Based on August 2020 data, tracked against March 2019, March 2020 (pre-Covid behaviour) and April 2020

5 credits | 2,500 GBP | 4,800 AUD | 3,300 USD | 2,900 EUR

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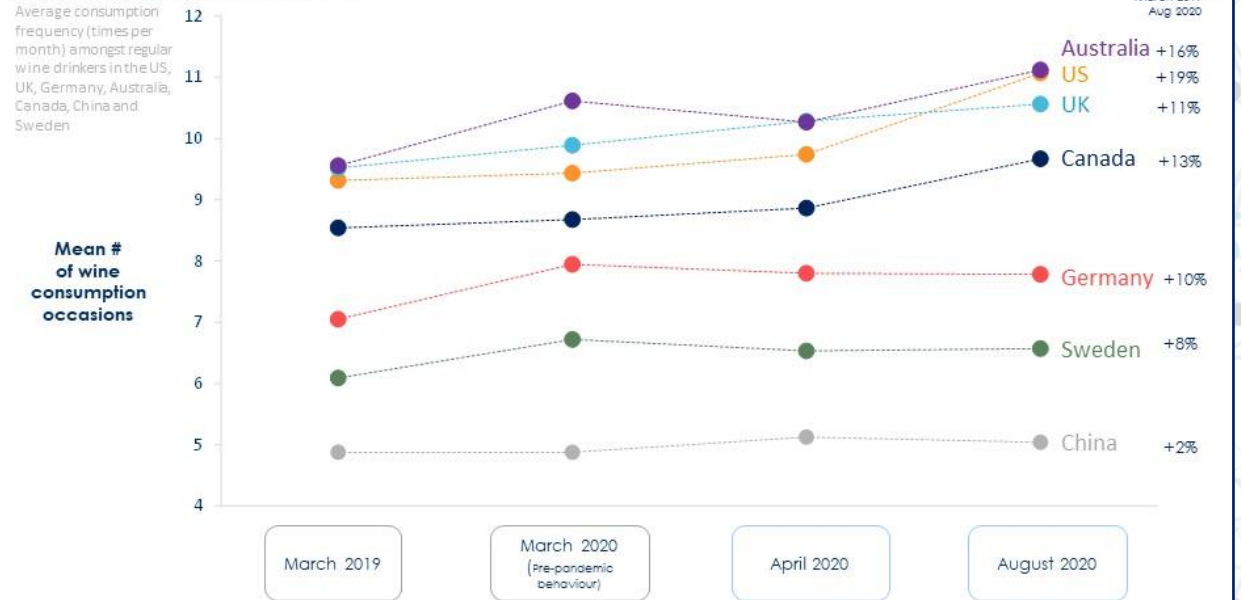
## EXAMPLES FROM THE REPORT:

### HOW HAS TOTAL WINE CONSUMPTION FREQUENCY CHANGED IN 2020?



Total frequency of wine occasions has increased across all markets measured here since 2019, and this growth has been sustained through the period of Covid-related restrictions

Average number of times wine is consumed, combined on- and off-premise, per month amongst regular wine drinkers



Regular wine drinkers: Those who drink wine at least once a month or more. Exception China: All Chinese urban upper-middle class semi-annual imported wine drinkers  
Source: Wine Intelligence Vinitrac® Global, Mar '19, Apr '20 (23rd March – 16th April), Aug '20 (16th July – 13th August), n>=709 regular wine drinkers in each market



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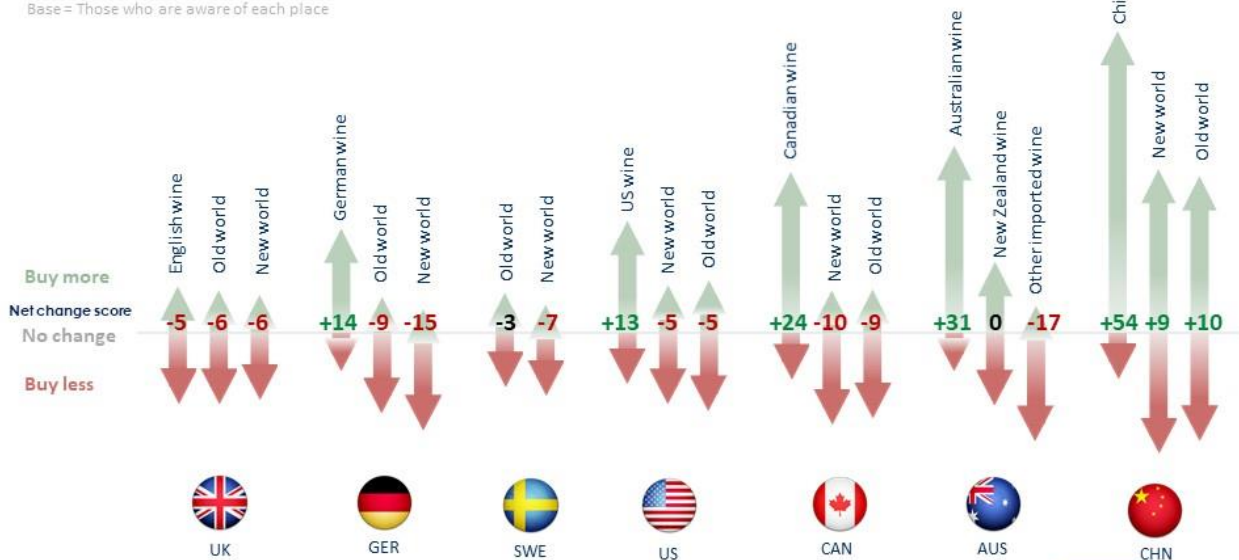
### COUNTRY OF ORIGIN: CHANGE IN PURCHASE



Locally produced wine has been the big winner in markets with major domestic wine production, with widely known and larger scale brands with broader distribution the biggest winners

Country of origin change in purchase during August 2020 compared with pre-pandemic behavior

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



Net change score = % consumers who buy more wine from this country minus % consumers who buy less wine from this country  
Source: Wine Intelligence Vinitrac® Global, Aug '20 (16th July – 13th August), n>=709 regular wine drinkers in each market



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