

# LA NUEVA NORMALIDAD

PARA EL VINO ARGENTINO

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# SESIÓN 1

06 JULIO 2020

## LINK GRABACIÓN

La previsualización de videos de Dropbox permite la reproducción por un tiempo limitado (1 hora).

Para visualizar el video completo deberá descargarlo en su equipo.

MUCHAS GRACIAS





WINE INTELLIGENCE

# Wine consumption during & post COVID-19

**JULY 2020**

# 5 LEARNINGS FROM LOCKDOWN

## & OUR COVID-19 IMPACT REPORT SERIES



1

**WHEN LIFE GETS DIFFICULT, LITTLE LUXURIES MATTER**

2

**THANK YOU ZOOM AND THE MILLENNIALS WHO USE YOU FOR SOCIAL DRINKING**

3

**ONLINE RETAIL AND CONVENIENCE ARE THE WINNING CHANNELS**

4

**PEOPLE ARE CAUTIOUS ABOUT IN-PERSON LARGE SCALE EVENTS**

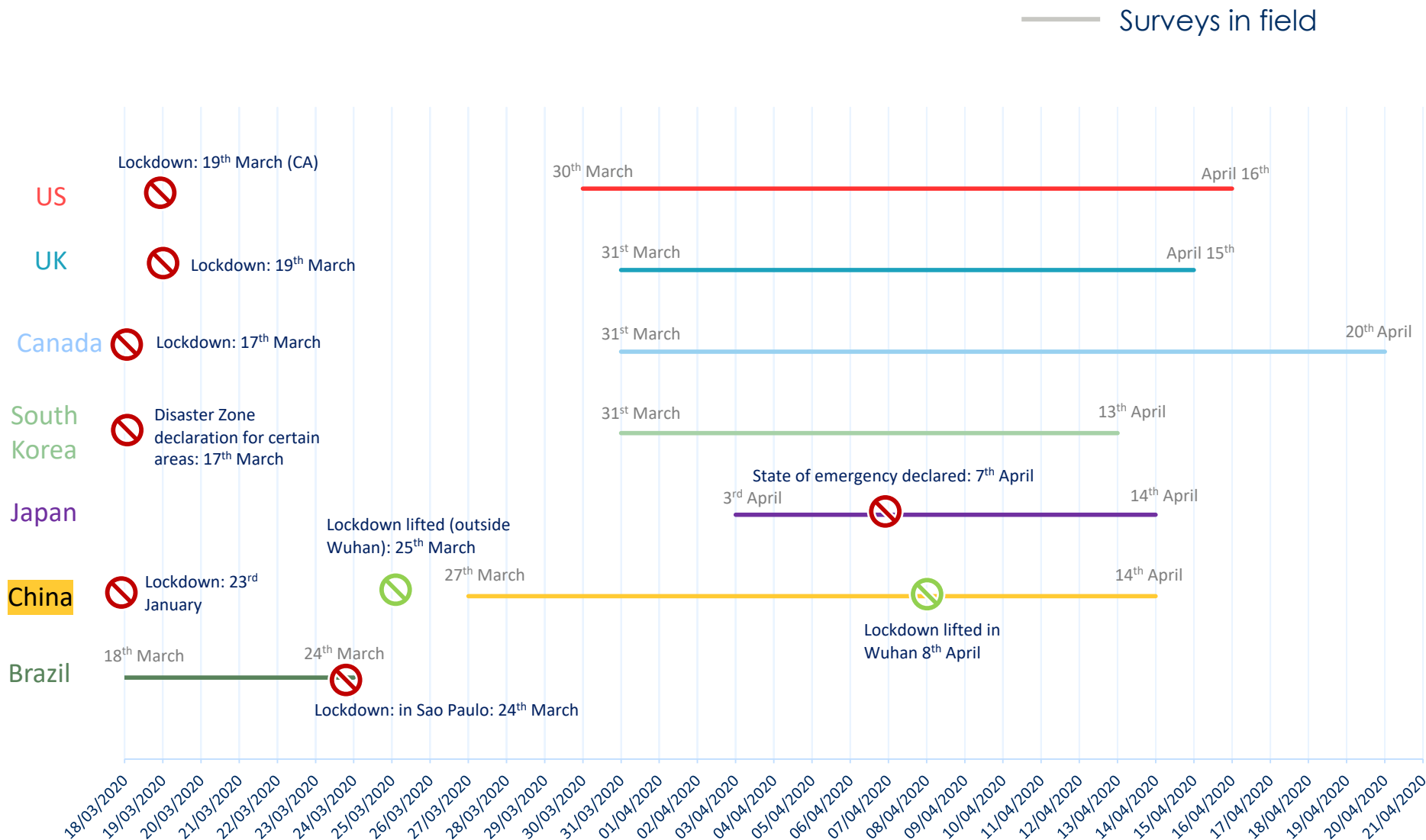
5

**MONEY WORRIES MAY PUT THE BRAKES ON SPENDING FOR AT LEAST 12 MONTHS – PROBABLY LONGER – ALTHOUGH POTENTIALLY LESS IMPACT IN ASIAN MARKETS**



## HOW HAS WINE DRINKING CHANGED?

# TIMELINE CONTEXT DURING SURVEY DATA COLLECTION

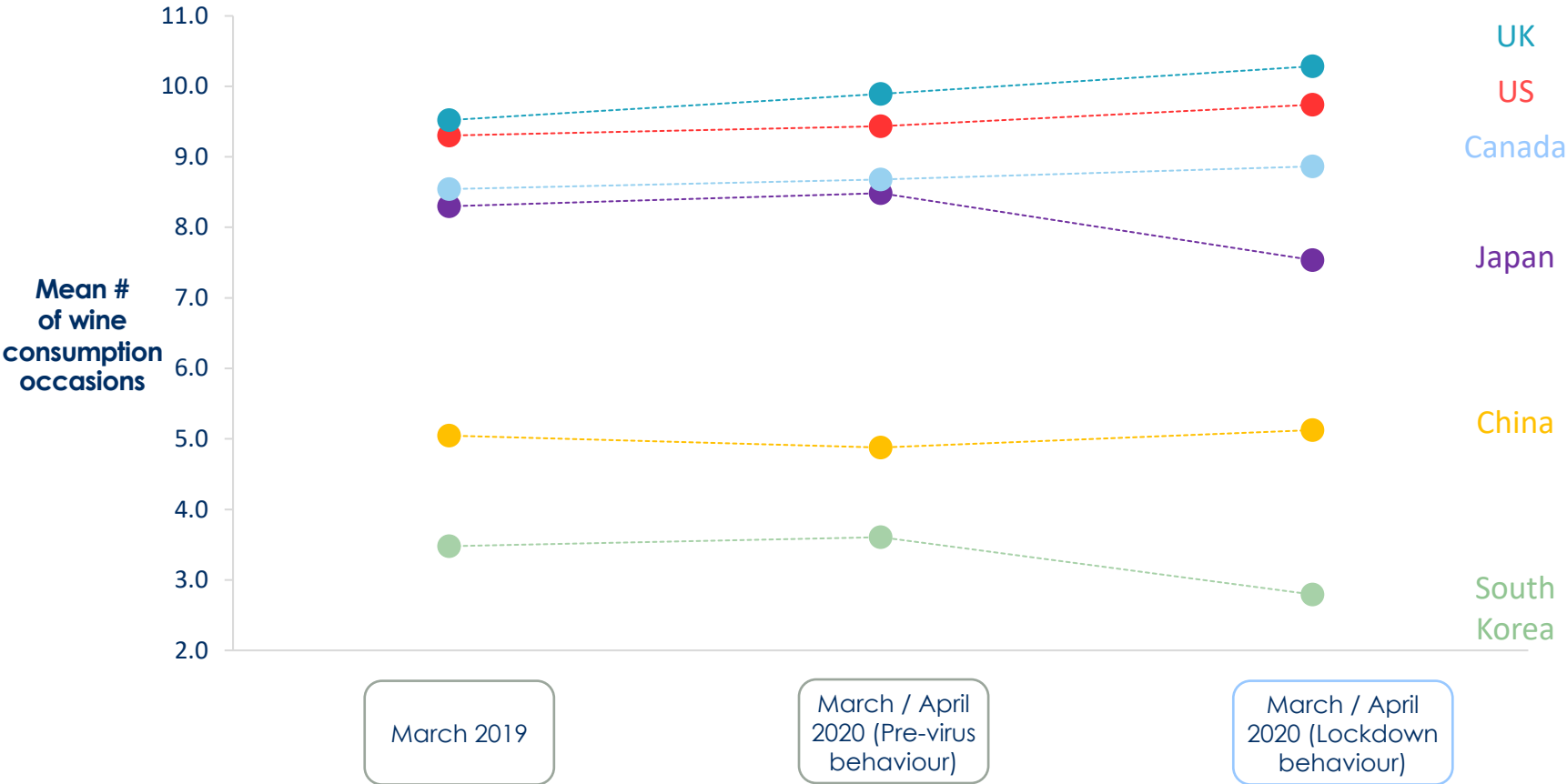


# HOW HAS WINE DRINKING CHANGED?



## Wine consumption frequency means

Average consumption frequency (times per month) amongst regular wine drinkers in UK, US, Canada, Japan, China and South Korea

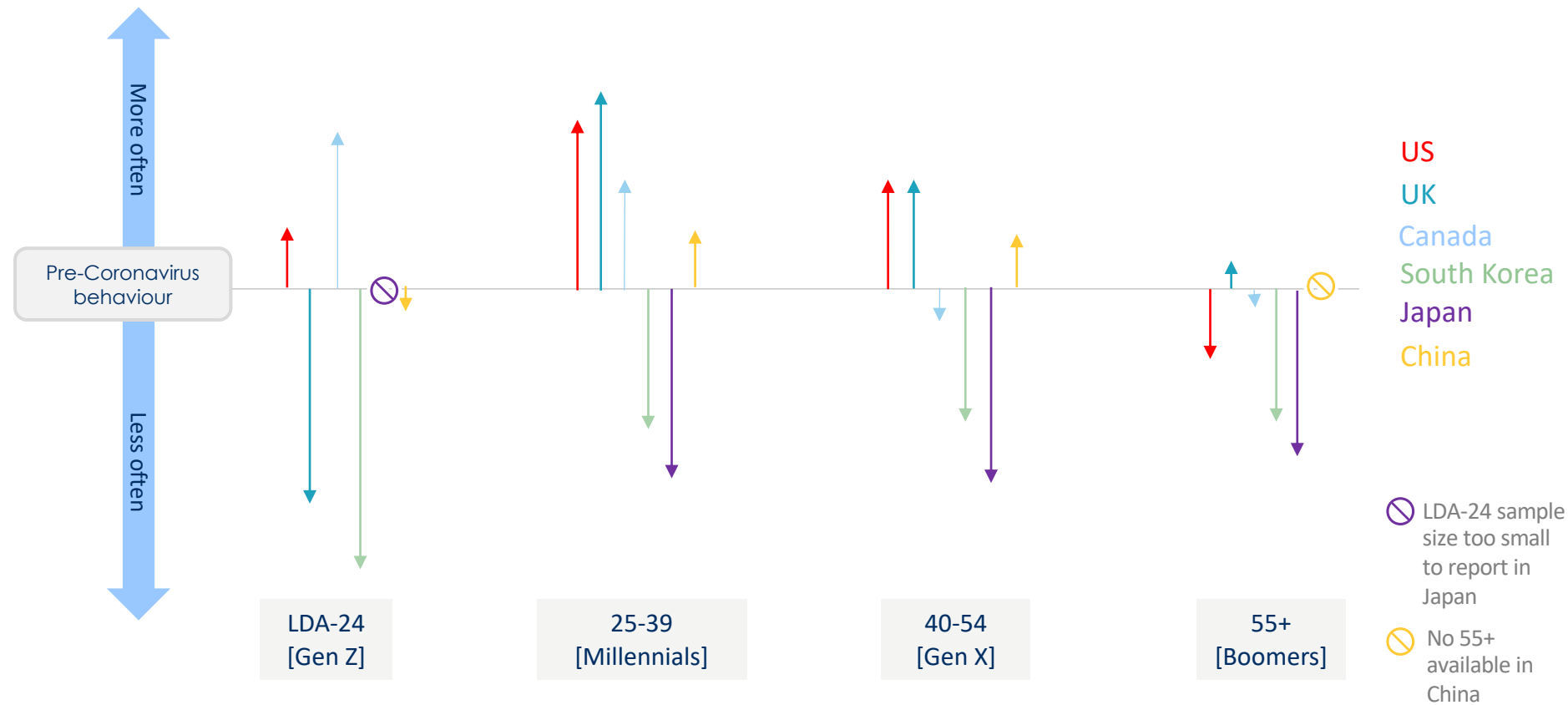


# WHO HAS CHANGED THEIR WINE DRINKING DURING LOCKDOWN?



## Change in wine consumption frequency: Lockdown behaviour vs March 2020 Pre-Coronavirus behaviour

Average consumption frequency (times per month) amongst regular wine drinkers in the US, UK, Canada, South Korea, Japan and China



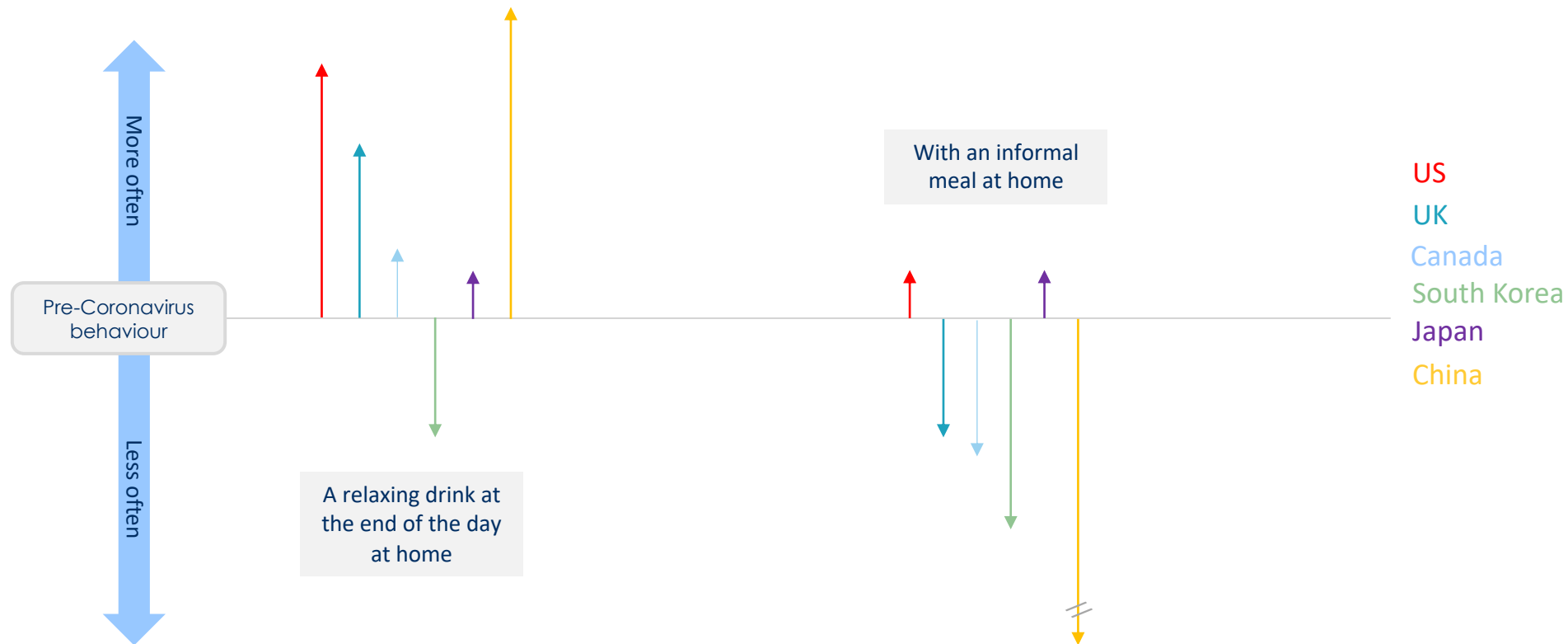
# HOW HAS WINE DRINKING CHANGED DURING LOCKDOWN?



## Change in wine consumption frequency: Lockdown behaviour vs March 2020 Pre-Coronavirus behaviour

Indexed change in wine drinking behaviour at each occasion during lockdown

Base = Those who buy wine in the off-trade

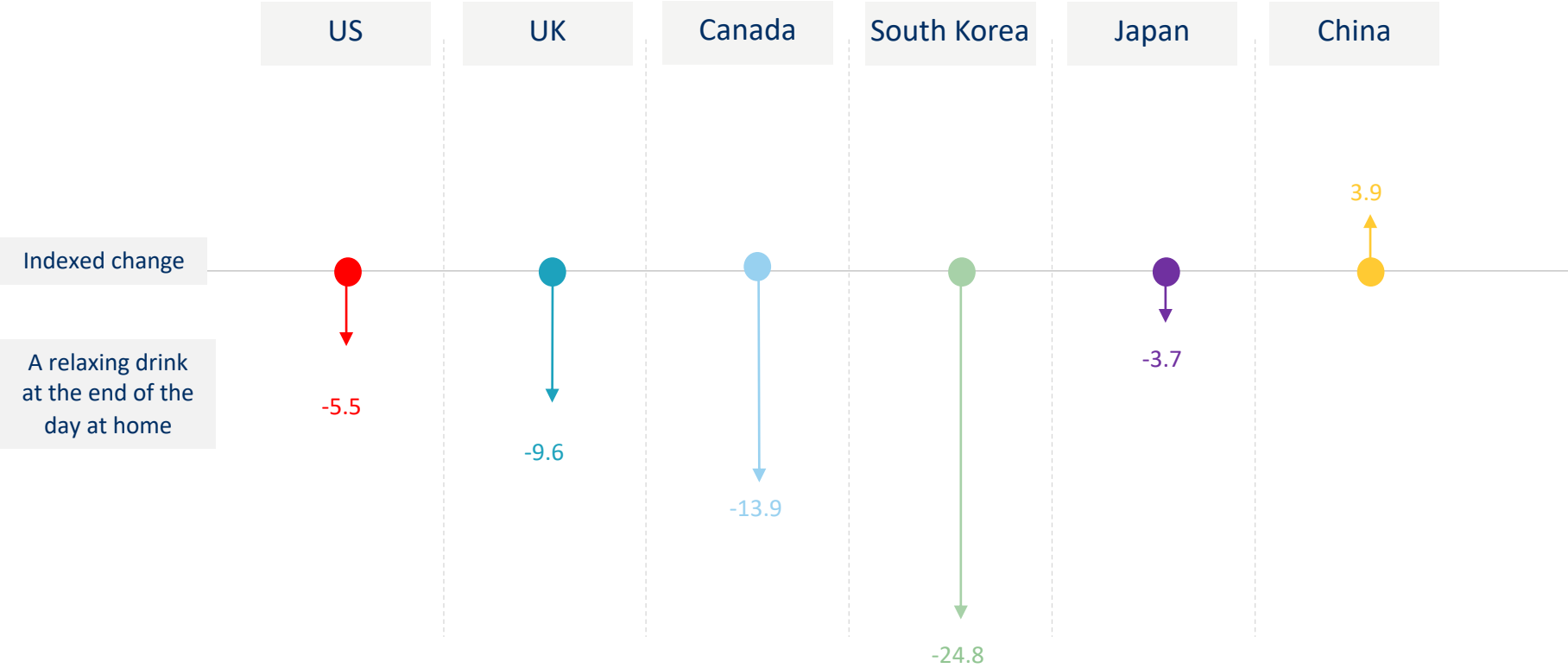


# HOW HAS WINE SPEND CHANGED DURING LOCKDOWN?



## Change in wine spend: Lockdown behaviour vs March 2020 Pre-Coronavirus behaviour

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



# WHAT ARE THE 'LOCKDOWN' WINE OCCASIONS?

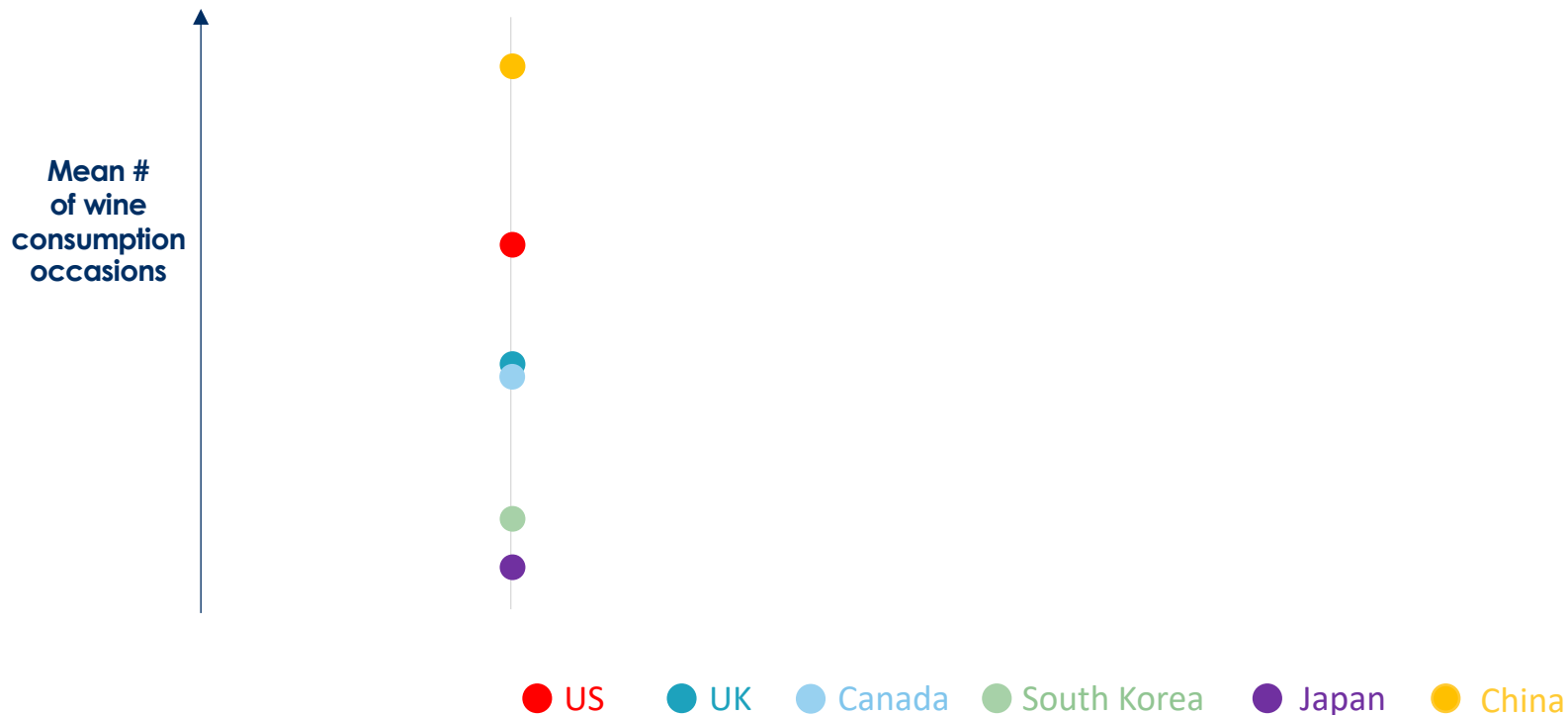


## Frequency of wine consumption at specific lockdown occasions

Wine consumption  
frequency per occasion  
during lockdown



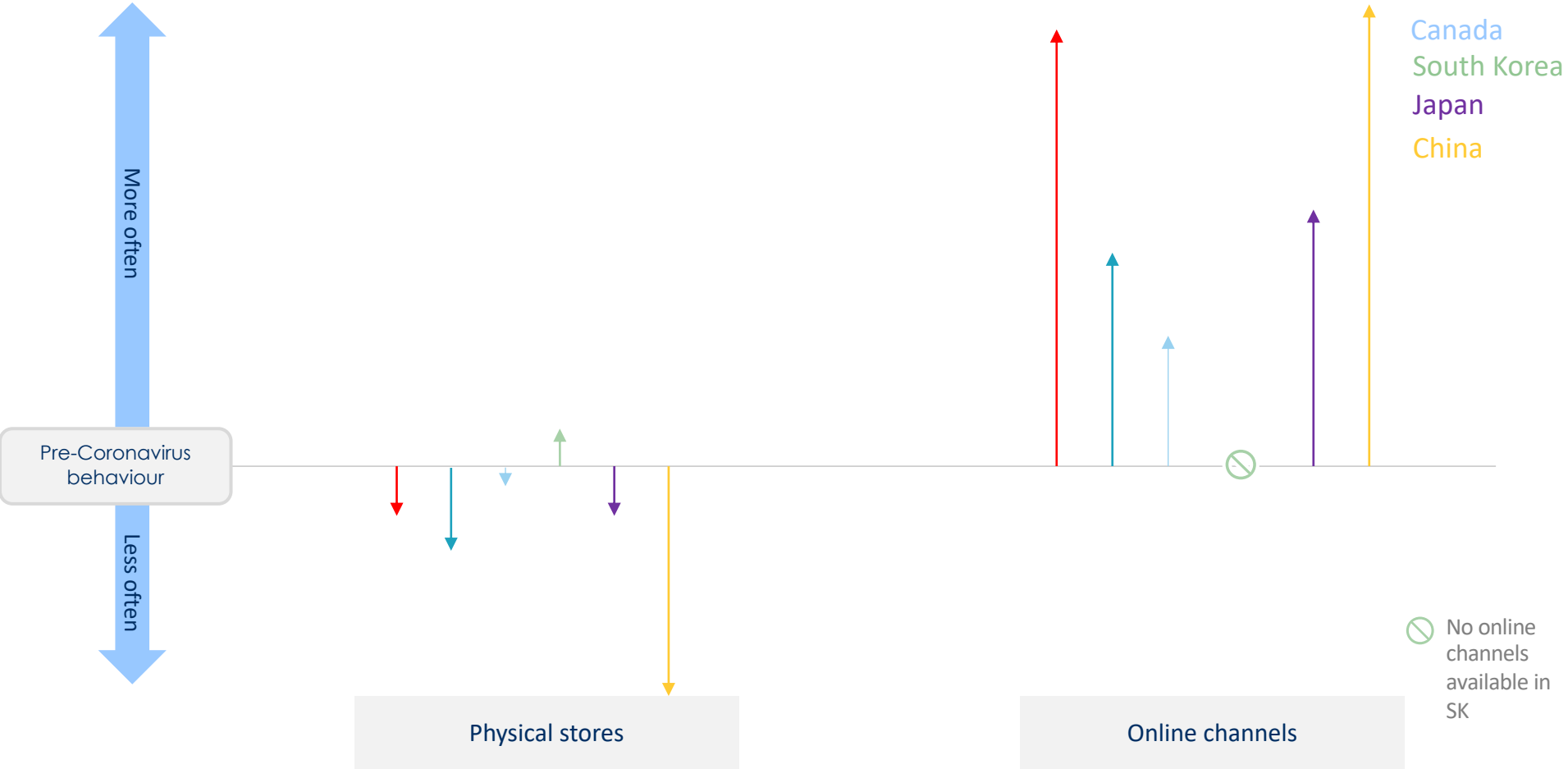
When catching up with  
friends or family online  
or on the phone



# HOW HAS WINE PURCHASE LOCATION CHANGED?



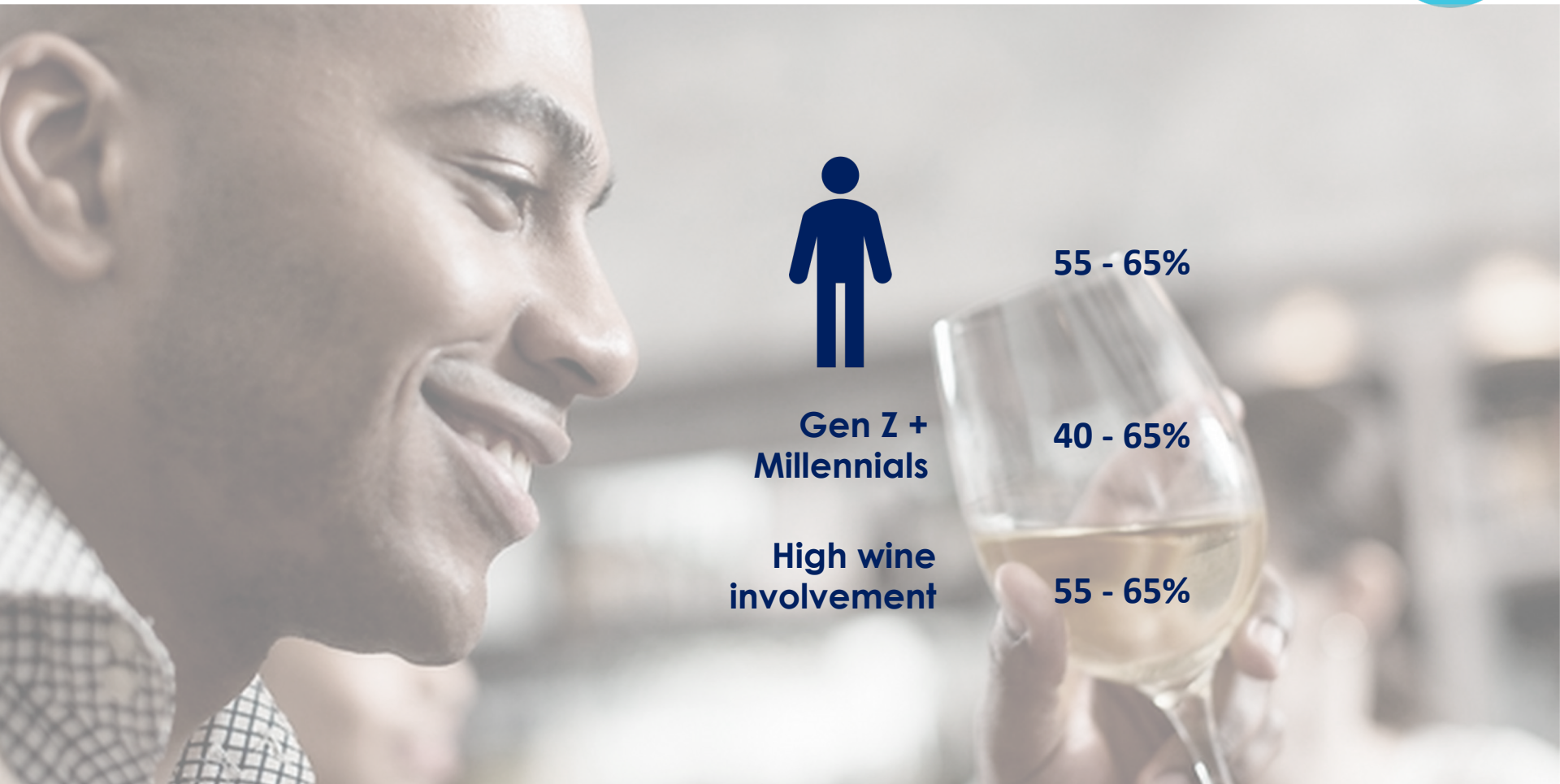
Wine-buying channel: Lockdown behaviour vs March 2020 Pre-Coronavirus behaviour



Source: Wine Intelligence Vinitrac® Global, Mar '20 (27th March 2020 – 20th April 2020), n>=1,000 regular wine drinkers in each market



# WHO SWITCHED TO ONLINE WINE PURCHASING DURING LOCKDOWN?



**Gen Z +  
Millennials**

**High wine  
involvement**

**55 - 65%**

**40 - 65%**

**55 - 65%**



## Wine consumption frequency: Pre-virus vs virus behavior

Base = All Brazilian imported wine drinkers (n=1,000)

Average consumption frequency (times per month) among imported wine drinkers in Brazil



# COVID-19 IMPACT IN BRAZIL:



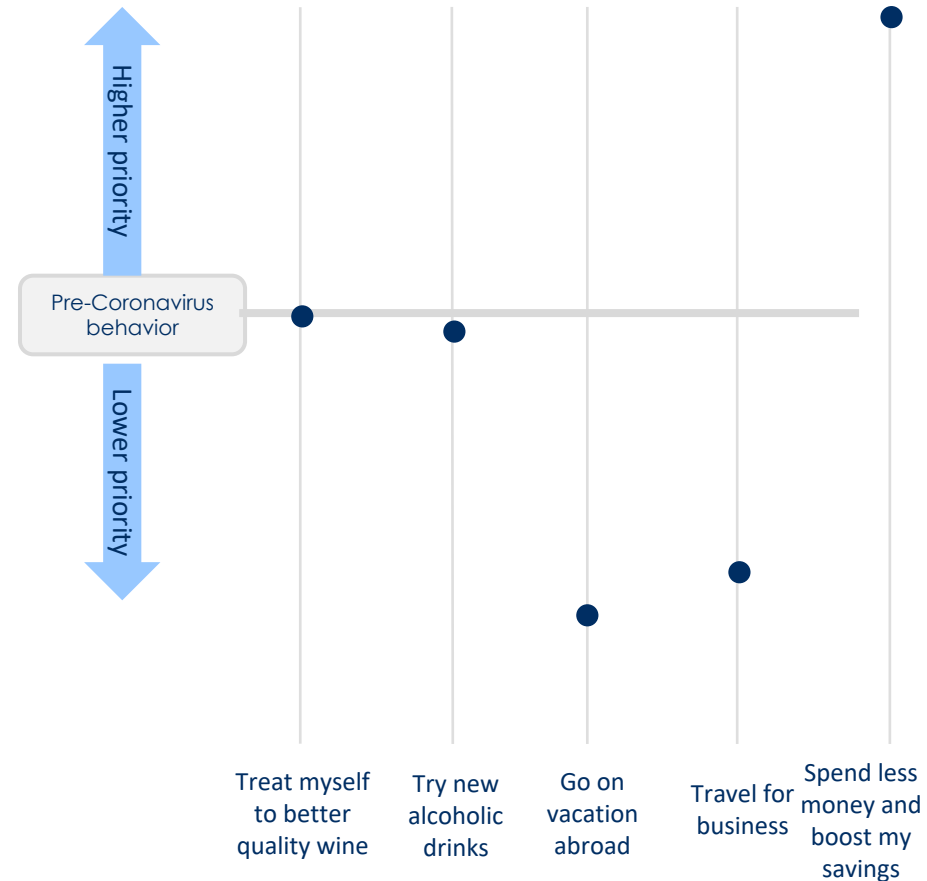
## Off-trade index change in wine consumption frequency during COVID-19 March 2020

Indexed change in wine drinking behavior at each occasion during virus impact  
Base = Those who buy wine in the off-trade



## Future intentions

Change in priorities for the following activities once the danger of Coronavirus has passed  
Base = All Brazilian imported wine drinkers (n=1,000)



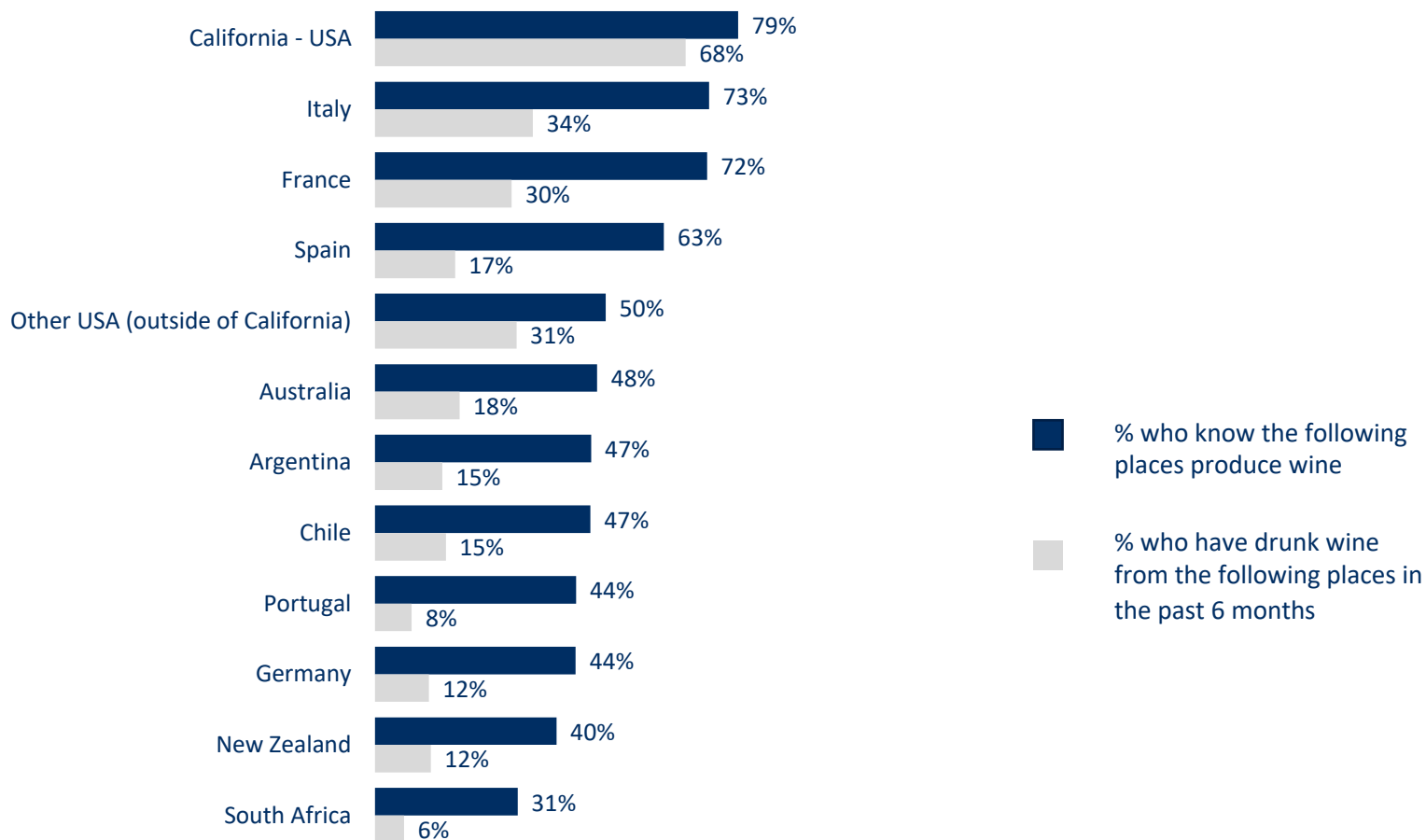
# HAS PERCEPTION OF COUNTRIES OF ORIGIN CHANGED?

## USA CASE STUDY



## Country of origin awareness and consumption

Base = All US regular wine drinkers (n>=2,000)



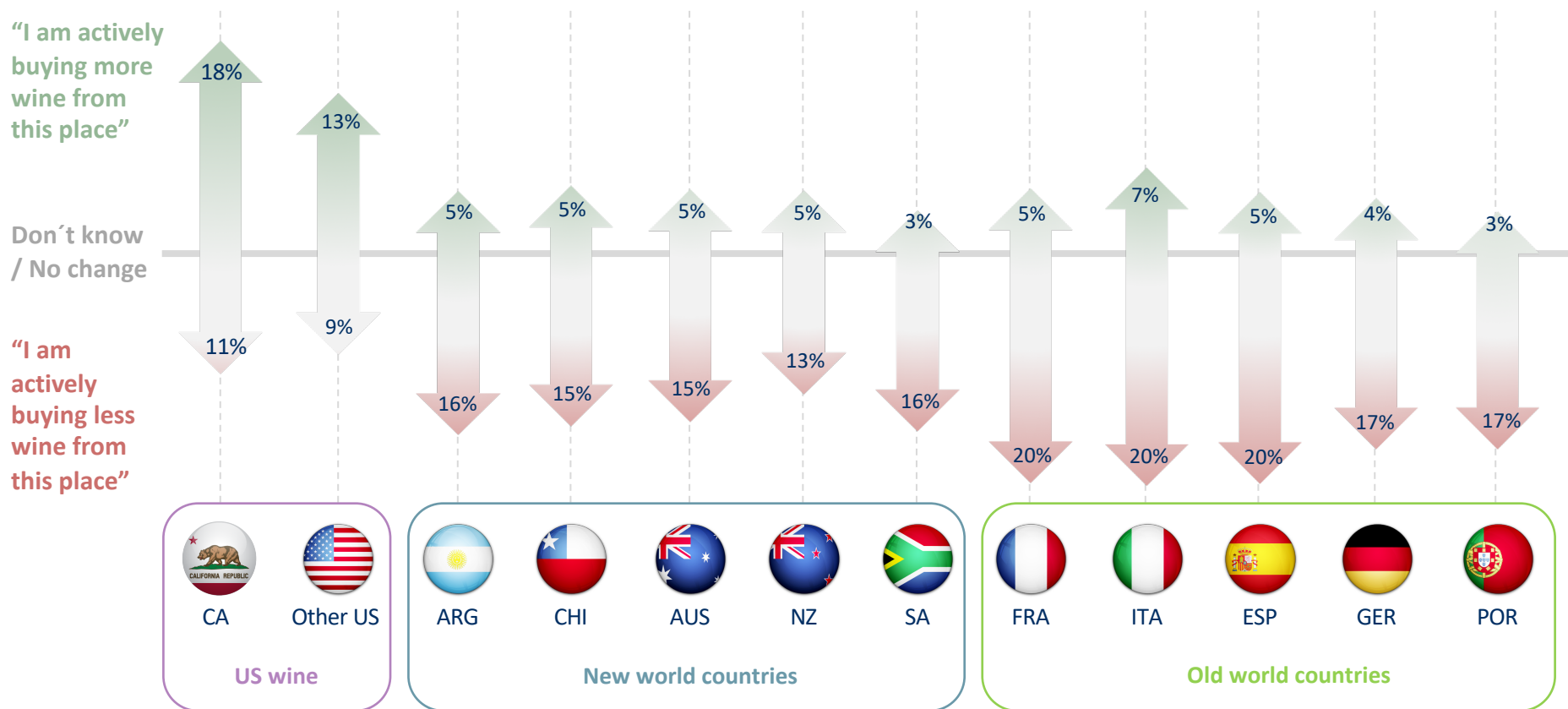
# COUNTRY OF ORIGIN: CHANGE IN PURCHASE MOTIVATIONS



## Country of origin change in purchase during lockdown March / April 2020 compared with pre-virus behaviour in the USA

% who have changed their purchase behaviour of each place due to the impacts of Coronavirus

Base = Those who are aware of each place



## Country of origin change in purchase & trust during lockdown March / April 2020 compared with pre-virus behavior in the USA: by age cohorts

Index: change in purchase behavior / trust of each place due to the impacts of Coronavirus



## WHAT ARE OUR FUTURE PRIORITIES?



# WHAT WILL FUTURE BEHAVIOUR LOOK LIKE AMONGST WINE DRINKERS?



## Change in typical behaviour anticipated after virus restrictions - Drink

% who are more or less likely to do the following activities when the danger of Coronavirus has passed and normal activities are permitted



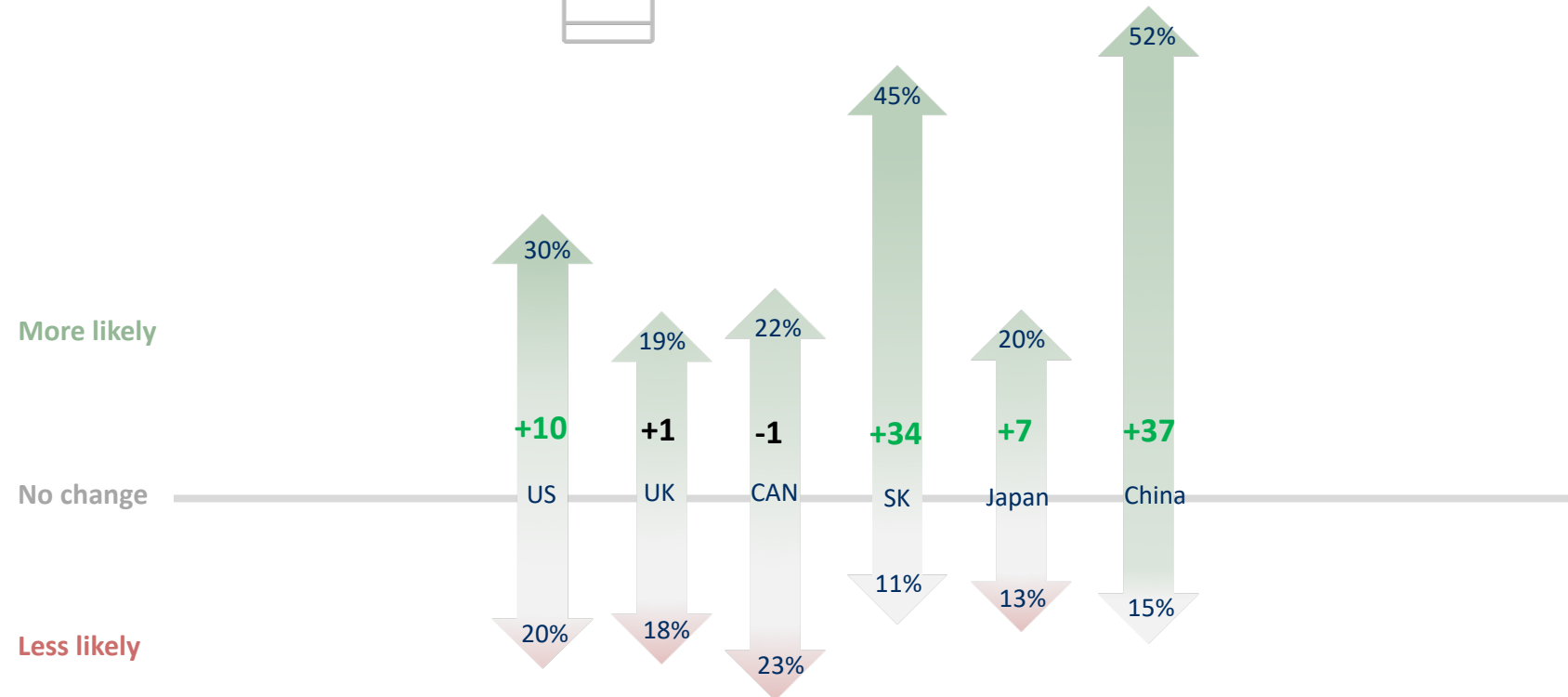
# WHAT WILL FUTURE BEHAVIOUR LOOK LIKE AMONGST WINE DRINKERS?



## Change in typical behaviour anticipated after virus restrictions - Food and drink

% who are more or less likely to do the following activities when the danger of Coronavirus has passed and normal activities are permitted

Shop online for beverages and groceries



# WHAT WILL FUTURE BEHAVIOUR LOOK LIKE AMONGST WINE DRINKERS?



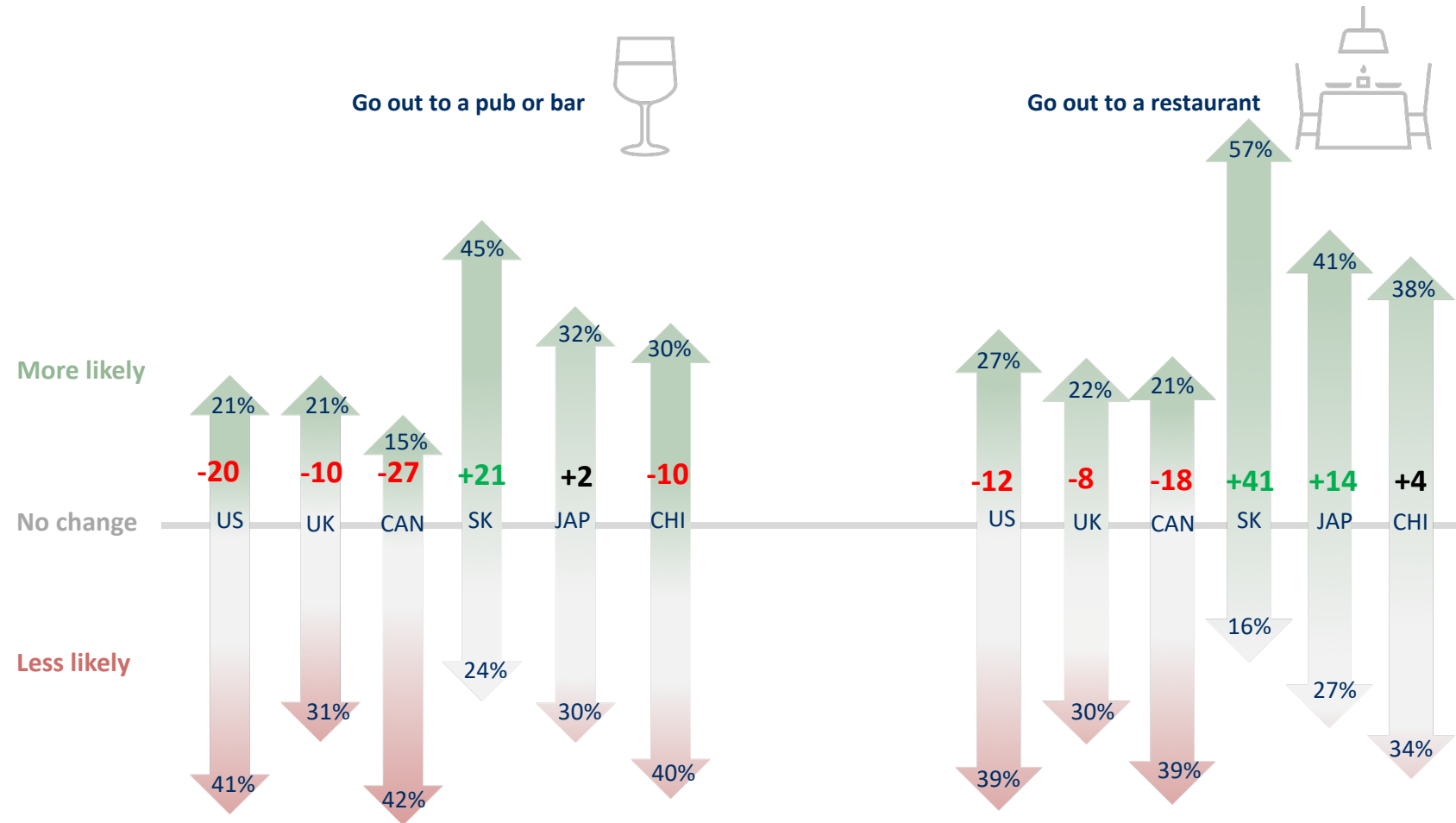
## Change in typical behaviour anticipated after virus restrictions – Going out

% who are more or less likely to do the following activities when the danger of Coronavirus has passed and normal activities are permitted

### Go out to a pub or bar



### Go out to a restaurant



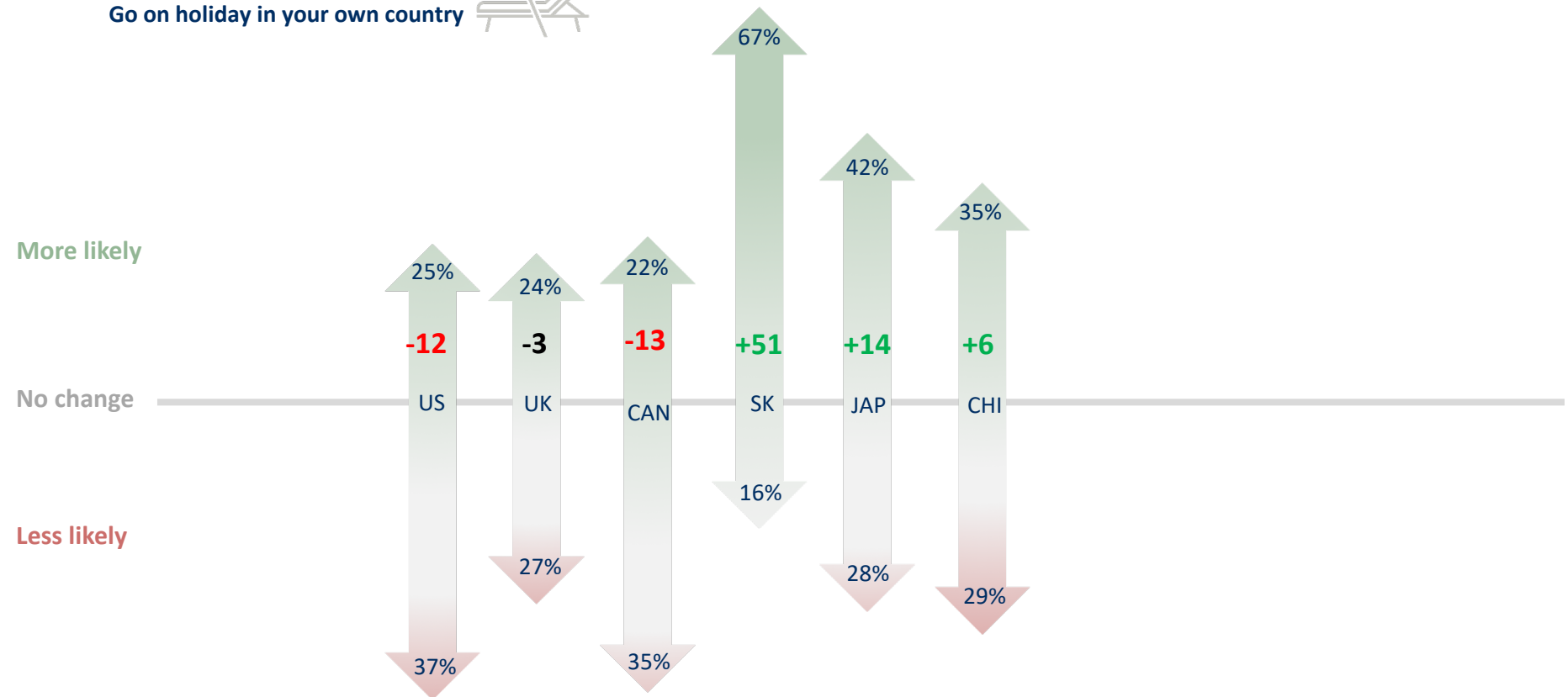
# WHAT WILL FUTURE BEHAVIOUR LOOK LIKE AMONGST WINE DRINKERS?



## Change in typical behaviour anticipated after virus restrictions – Vacation

% who are more or less likely to do the following activities when the danger of Coronavirus has passed and normal activities are permitted

Go on holiday in your own country 



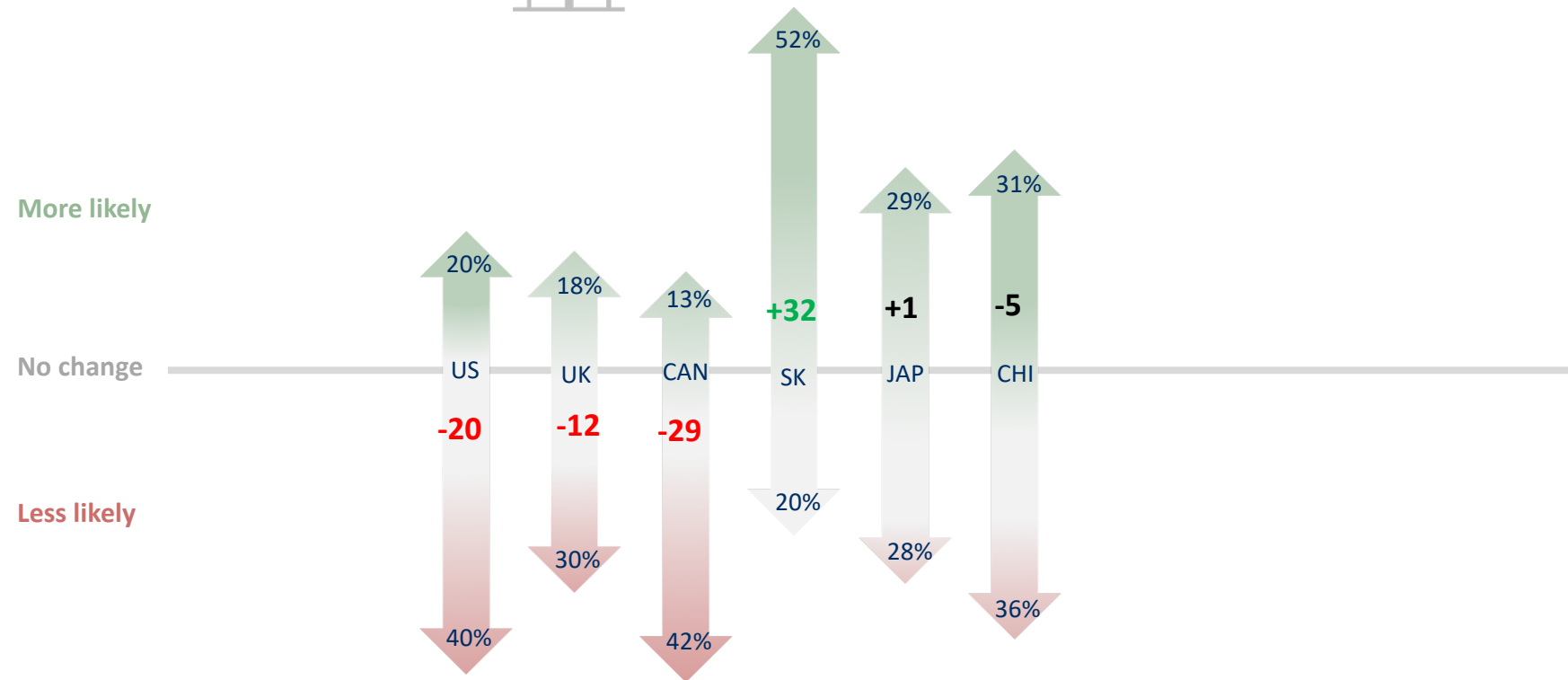
# WHAT WILL FUTURE BEHAVIOUR LOOK LIKE AMONGST WINE DRINKERS?



## Change in typical behaviour anticipated after virus restrictions - Travel

% who are more or less likely to do the following activities when the danger of Coronavirus has passed and normal activities are permitted

Stay at a hotel for business or pleasure



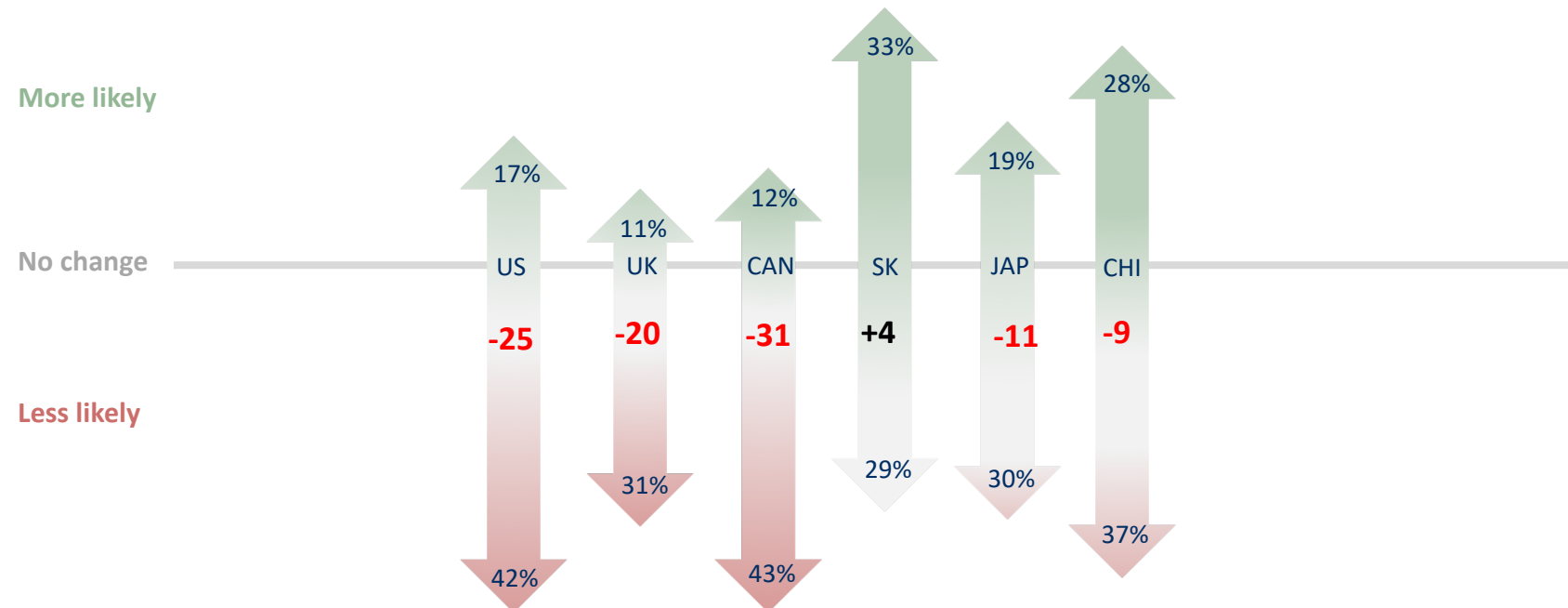
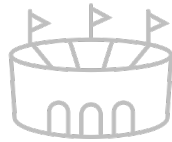
# WHAT WILL FUTURE BEHAVIOUR LOOK LIKE AMONGST WINE DRINKERS?



## Change in typical behaviour anticipated after virus restrictions - Events

% who are more or less likely to do the following activities when the danger of Coronavirus has passed and normal activities are permitted

Attend a sporting event

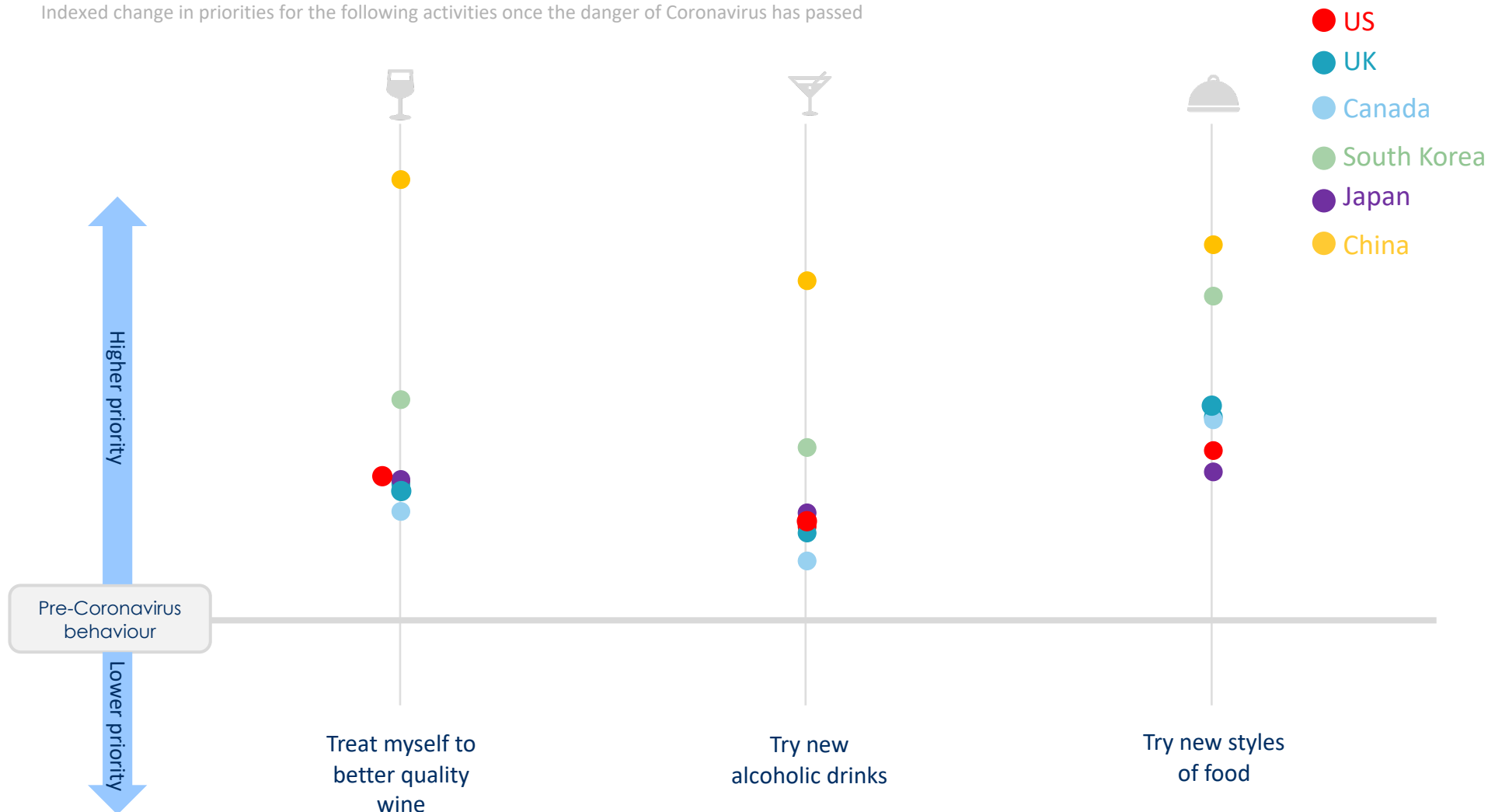


# WHAT WILL OUR FUTURE PRIORITIES BE?



## Future priorities – Food and drink

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



# WHAT WILL OUR FUTURE PRIORITIES BE?



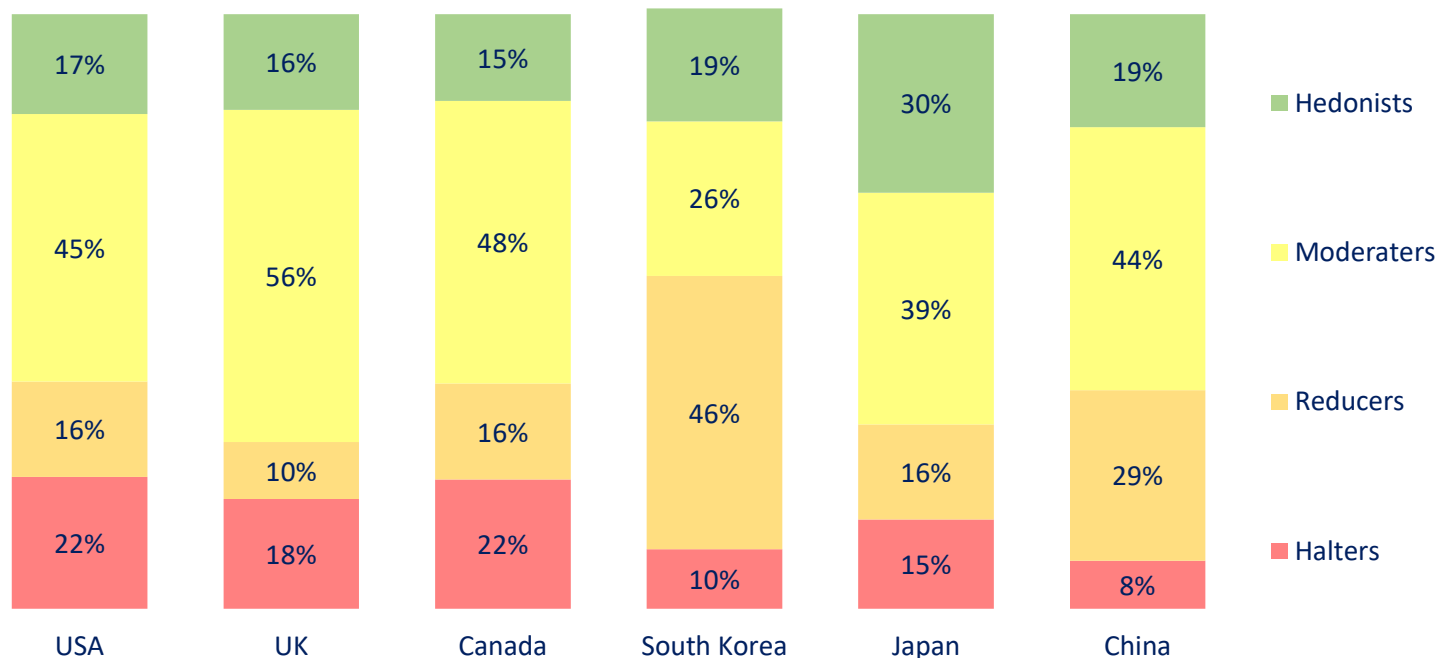
## Future priorities – Spending

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





# WINE CONSUMER COVID-19 IMPACT SEGMENTS



## Hedonists

Anticipate increasing social & lifestyle activities anticipated post-lockdown

## Moderators

Few life-style changes anticipated post-lockdown

## Reducers

Will significantly curtail their life-styles and social lives post-lockdown

## Halters

Anticipate almost ceasing in all social and lifestyle activities

# RECOMMENDATIONS: GO-TO-MARKET DURING & AFTER COVID-19



1



Focus on core drinkers – Explore Millennial opportunity

2



Focus on core brands and value propositions

3



Explore & exploit the online / omnichannel and shopper marketing opportunity

4



Opportunity for agile innovation & NPD that focuses on relevant benefits

5



Continue marketing spend – it's more effective now (and particularly during recession) than before



*Connecting wine businesses with  
knowledge and insights globally*

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