



# BEHAVIOUR OF EUROPEAN WINE CONSUMERS DURING THE LOCKDOWN

The European Association of Wine Economists (EuAWE, [www.euawe.com](http://www.euawe.com)) and the INSEEC U. Wine and Spirits Chair launched a survey on 17 April in 8 countries (Spain, Belgium, Italy, France, Austria, Germany, Portugal, Switzerland) to determine how the Covid-19 crisis is affecting the behaviour of European wine consumers.

The survey has been closed on Sunday 10 May 2020 at 18:00. A first exploitation of the data available on April 30th has been conducted for 4 countries: Spain, France, Italy and Portugal. This represents a total of approximately 7300 respondents. For each country, annexed files provide the basic descriptive statistics. The present summary is based on these statistics as well as on cross-analyses and logistic econometric modelling to measure the determinants of consumption by country and type of alcohol. All these analyses are preliminary. An in-depth analysis of the data set and the refinement of statistical techniques will complement this first study. However, in view of the number of responses available as of 30 April and following the law of large numbers, the results that we deliver here are statistically robust. **However, it should be remembered that the sample is not intended to be representative of the population of the countries studied, but rather corresponds to a population of alcohol drinkers, particularly wine drinkers.**

This synthesis is articulated in four points analysing:

1. Frequency of consumption
2. Purchasing and consumption patterns
3. The determinants of consumption
4. A prospective study on the long-term consequences of the lockdown

## 1. AN INCREASING FREQUENCY OF CONSUMPTION

Respondents in all four countries consume relatively few spirits compared to beer and wine. Beer is mostly consumed by students and, more generally, by young people under 30. Older respondents tend to consume wine. Spain stands out for a significantly higher frequency of beer consumption than other countries.

**In all countries, the frequency of wine consumption has increased sharply with the lockdown, whereas it has fallen for beer and, even more so for spirits.** It is in France that the increase in the frequency of wine consumption is most marked: 44% of respondents report drinking wine more frequently during the lockdown than in normal circumstances.

The 30-50 year-old category has increased its frequency of alcohol consumption the most, whereas young people reported to have drunk less frequently. Not having any child in the household was also a factor in the increase in drinking frequency. Finally, income played a statistically significant role in increasing drinking frequency only in France. Higher incomes

were associated with a higher frequency of wine consumption, while lower incomes increased the frequency of beer consumption.

## 2. MODIFIED PURCHASING AND CONSUMPTION PATTERNS

Respondents **spent less overall** on alcohol, particularly on spirits. **The average purchase price of wine decreased significantly.**

Supermarkets remain the main distribution channel. Most of the other distribution channels experienced a severe decline. Two supply vectors have gained ground during the lockdown:

- Online purchasing: with more than 80% of respondents not using this channel, **we cannot speak of "amazonisation" of wine consumption.** However, 8.3% of Italians bought wine for the first time on the Internet, as did 6.6% of Spaniards, 5.2% of Portuguese, and 4.6% of French.
- Self-supply: **destocking has been the main vector for increasing the frequency of wine consumption.** Personal cellars have become the second most important source of wine supply after supermarkets.

Forms of consumption involving people outside the family have logically collapsed. Two facts single the lockdown out:

- **The significant increase in wine consumption by people drinking alone**, especially among men with modest incomes and unemployed.
- **The explosion of the phenomenon of digital aperitifs.** This strong emergence of digital aperitifs is spectacular among young Italians, especially students, and among the French, especially the 30 to 50 years old in urban areas with comfortable incomes. Nearly half of the French respondents declared that they practiced this form of aperitif.

Young people and urban dwellers working in the tertiary sector tend to drink wine quickly after purchase. One possible interpretation is linked to the probably poor conditions of storage (lack of space, of a cellar for conservation) and culture difference for the younger ones.

French people in general are more likely than others to keep their wine before drinking it, especially in households with two or more children. This tendency has allowed them to consume themselves even more than others during the lockdown.

## 3. ANXIETY, PRECARIOUSNESS, BUT ALSO TASTE AND DIGITAL AS A CONSUMPTION ACCELERATOR

When the determinants of increased drinking frequency in different types of alcohol are studied econometrically, several statistically significant factors emerge.

A key feature of the lockdown is that the anxiety generated by the pandemic is a factor associated with increased consumption of all alcoholic beverages in all countries. More than fear of the virus itself, respondents express a very strong fear for the economic consequences of the health crisis. **This "economic" anxiety has a particular impact on the increased frequency of alcohol consumption.**

The smaller the size of the household, especially being alone or without children, the greater the tendency to drink alcohol more frequently during the lockdown. Being an unemployed man increases the likelihood of drinking spirits more frequently. Lower incomes are associated in

France with an increase in the frequency of beer consumption. In short, **various factors of precariousness, such as loneliness, unemployment and low income can be related to an increase in drinking frequency.**

In particular, the frequency of wine consumption has increased among those who drink for more personal reasons (I like the taste, wine relaxes me) than for social reasons (sharing with friends, collective tastings). The frequency of drinking for the latter (socialisation reasons) tended logically to decrease or stagnate. **The lockdown has therefore made those who like wine for wine's sake drink more frequently than others.**

In all countries, the phenomenon of digital aperitifs is associated with a significant increase in the frequency of consumption of all alcohols.

Finally, the fact of having received offers from winemakers or wine merchant websites is associated with a significant increase in consumption. This may be related to purchases delivered by producers/merchants (in the 'other' purchases in the survey), implying successful marketing by these producers/merchants.

#### 4. A PERIOD THAT WILL LEAVE MULTIPLE TRACES?

In a prospective logic, the survey raises questions about future consumption and purchasing trends and provides some possible answers.

Around **70% of respondents believe that it is necessary to favour the purchase of local wine in this period of crisis.** This proportion echoes a general demand from the population following this health crisis to turn to short circuits in the food industry. Local purchasing could be a groundswell in the post-covid world. This has two implications for producers: relearn how to seduce and welcome local buyers, but also anticipate reduced export opportunities.

**Three-quarters of respondents think they will no longer organise any online aperitif** after the lockdown, so 25% of respondents who have participated in this type of aperitif would like to continue. Will this form of consumption survive the lockdown? Will it continue as a minority practice but perhaps important among young people? The survey does not make it possible to decide. But this new practice raises many questions in terms of marketing, sales and services for alcohol merchants.

Does the increase in the frequency of alcohol consumption among people in precarious situations raise the question of the **development of a stronger risk of addiction for this fragile population?** It is not possible to answer this question. On the one hand because we are measuring a frequency of consumption and not a quantity consumed (one can drink more often but less in the end). On the other hand, because we do not know what was consumed in bars and restaurants before the lockdown. Has the increase in domestic frequency more than compensated for the decrease in consumption on-trade?

Does the high consumption of wine held in personal cellars suggest a **reconstitution of the stocks emptied during the lockdown?** It is possible to anticipate a rebound in purchases of more expensive wines (wines for laying down) than those purchased during the lockdown in the coming weeks.

#### METHODOLOGICAL REMARKS:

*All these results remain preliminary. No direct causal link has been established at this stage. The associations between certain variables, although statistically significant, do not mean that causality exists between them. All interpretations made in this text should therefore be treated with caution. A statistical treatment of causality will be carried out in the coming weeks.*

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