



## Wine Opinions Identity Recovered

I am very pleased to let everyone know that we have succeeded in reclaiming our wineopinions.com domain. Our website is running here: <https://wineopinions.com>.

During this time, none of our client data was lost, and our panels of members of the wine trade and wine consumers were not affected. We continued work as usual on our surveys and online discussions.

Please note our restored contact information:

- Website: <https://wineopinions.com>
- General inquiries: [info@wineopinions.com](mailto:info@wineopinions.com)
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Thanks very much and best regards,

*John Gillespie*  
Wine Opinions Founder and CEO

## "Social" Meets "Distancing"

As self-isolation and quarantines become routines of everyday life in the U.S., online or virtual gatherings of all sizes and kinds are becoming ubiquitous, often as outlets for social drinking or wine tasting. In a recent New York Times article, for example, Anna Goldfarb laid out advice for "How to Have a Successful Virtual Happy Hour." Tips included using the "grid" view in Zoom, limiting the participants to no more than 8 to 10, and including a set end time.

Wineries, likewise, are embracing "virtual" wine tastings as tasting rooms from Long Island to Lodi lock down.

Take, for example, Clos du Val winery in Napa Valley. Founded in 1972 and well respected as one of the stalwarts of Stag's Leap District Cabernet Sauvignon, the winery now offers an innovative program of personalized video conference tastings. Consumers can choose from 4-bottle sets of wine or create their own 4-bottle set. The package comes complete with a Coravin wine system. The purchaser chooses a day and time, then connects via Zoom conference to a personal tasting one-on-one with a member of the Clos du Val team.

This "taste from home experience" was launched the week of March 16th, and has become an instant success. "There's no question in my mind that from here on out we'll change the way we do business," says Clos du Val Director of DTC and Marketing Shannon Murrachioli. "We can bring wine country to consumers where they are, on their time, in their home, with the wines they enjoy the most."

Farther up the valley, at St. Supery in Rutherford, virtual wine tastings have a decidedly communal focus. Launched on March 16th, a weekly series of tastings every Thursday through April is conducted by the winemaking staff at St. Supery through Zoom Video.

St. Supery fans purchase a 6-bottle "Injoy@Home Tasting Kit" on the website and follow the tasting series on Facebook Live as well as the Zoom link.

Last week's "Injoy@home" event included welcoming comments from winery CEO Emma Swain, video clips of the fall harvest and cellar work, and a live iPhone-enabled walk through the vineyards, with a close-up look at bud break. A lively discussion of the wine in question - St. Supery's Rutherford Estate 2015 Merlot - was the main event.

There are many such virtual tasting programs and more will launch in the coming weeks. With their proliferation will certainly come the age-old but persistent question of drinking alone, or even drinking "apart," and this is where "social" confronts "distancing."

In an opinion piece in the New York Times last week, Tara Isabella Burton (a columnist at Religion News Service) addressed the issue and its cultural implications. She writes, "It would be easy to dismiss the rise of 'social distance socializing' as a product of pure necessity, a stopgap until we are, hopefully, able to safely congregate in person again. But these online gatherings are the culmination of a much broader cultural shift: the revelation that so much of our lives is already lived online." Her conclusion is revealed in the title of her essay - "Our 'Digital Selves' Are No Less Real."

But if the virtual happy hours and online wine tastings are indeed "social," what of drinking alone? Eric Asimov, of the New York Times, addressed this recently in his weekly wine column. "It would be easy to think oneself strange for wanting to enjoy a glass or two of wine with a dinner alone" he writes. "Popular culture has had a field day with the issue of solo drinking...but solitude and a little wine can send the mind in unexpectedly delightful directions. I prize the memories of these little interior journeys."

Everyone in wine knows well the pleasure and value of such "interior journeys." And most would agree that sheltering in place with a glass of wine is anything but self-isolation.

## Decoding the Surge in Wine Sales

Beverage alcohol off-premise sales jumped in the second week of March, and soared even higher the following week. Nielsen tracking figures of dollar sales for beer, wine, and spirits all show dramatic gains, with spirits slightly outperforming wine, as seen in the chart below:

Percent Sales Increase in Dollars vs. Same Week Previous Year

	7 MAR 20	14 MAR 20	21 MAR 20
Beer*	7.3%	14.0%	41.1%
Wine	1.7%	27.6%	66.0%
Spirits	4.8%	26.4%	75.0%

Source: Nielsen U.S. off premise channel aggregate  
\*Includes flavored malt beverages and cider

Within the wine category, the surge is led in good measure by boxed wines. Nielsen Senior VP of Beverage Alcohol Practices Danny Brager notes that 3L box wines were up in dollar sales 53% in the week ending March 14, and another 136% the week ending March 21. Sales of 5L box wines rose 23% and 66% in those weeks, respectively. "The sales numbers we've seen over the last couple of weeks are stunning," Danny says. "There are large and broad increases in wine purchases across varietals, origins, and price points as consumers stock up. The increases are greater than just a shift from on premise to off premise, but what remains to be seen in the future is the rate of consumption and re-purchase."

Jon Moramarco, the Managing Partner of bw166 LLC, points to a degree of "location shift" accounting for part of the off premise sales surge. "The on-premise segment accounts for about 16% of total U.S. wine consumption by volume," he says. "Those sales are being compensated by the gains in off-premise sales." Moramarco goes on to pose a question: "Are the increases in off-premise sales for immediate consumption, or are they just panty-loading?" He cautions that even when stay-at-home orders are eased, the challenge will be for wine producers to maintain steady growth in off-premise sales until the on-premise sector can fully recover.

Wine Opinions will soon launch a survey of high-frequency wine drinkers on their shifting overall wine purchase and consumption behaviors, with a focus on respondents who are normally frequent buyers of wines by the glass or bottle in restaurants. The survey will also probe the segment of consumers who are wine club members or frequent online purchasers of wine, in comparison with those who have just recently started making online purchases. Topline results of this survey will be presented in the next issue of this newsletter.

## Promotional Campaigns Respond to Tariffs

Although it has been reported in the Wall Street Journal that collection of customs duties on wines imported from France, Germany, and Spain may be temporarily suspended for three months, there appears to be no lasting relief on the horizon for the 25% tariffs imposed last fall.

Import volumes of these wines have dropped dramatically since the October imposition of tariffs. In response, those charged with representing and promoting wines from France, Germany, and Spain are redoubling their efforts to maintain share of market.

Wine Opinions asked several of those who direct these campaigns to summarize their efforts. There is consensus that the trade is mainly still working through inventories, and that importers and exporters are together absorbing most of the added costs.

Pablo Olay of Padilla in New York directs the campaign for the wines of Ribera del Duero and Rueda. He believes that keeping focus on "investing and positioning our wines as best in class" remains the foundation of the campaign, and confirms that campaign stakeholders in Spain remain committed to promoting their wines on the U.S. market.

The Wines of Germany campaign is directed by Stephen Schmitz at RF Binder in New York. He has seen some sales declines recently, and the campaign has responded in part by launching a consumer engagement initiative on German Sekt wines, which are sparkling, and therefore not subject to the tariffs. The campaign, "Let's Talk About Sekt," is aimed at the wine trade and media as well as reaching consumers through digital content and advertising.

Neither Pablo nor Stephen reported seeing consumers "trading down" in price point among their Spanish or German wine purchases. A recent Wine Opinions survey of imported wine buyers confirmed significant degrees of county-of-origin loyalty among this group, with 39% agreeing that wines from Europe are often better bargains than California wines, and another 30% agreeing that European wines are generally more expensive than domestic wines, but worth the price.

European Wines Agreement Statements

Wines from Europe are often better bargains than California wines	39%
European wines are generally more expensive than domestic wines, but worth the price	30%

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