



SHELTER-IN-PLACE CONSUMPTION, DELIVERY, & SMART REGULATION

WEDNESDAY, APRIL 29, 2020



MICHELLE KORSMO

PRESIDENT AND CEO





CORY RELLAS

CEO



DALE STRATTON

ANALYST



JO MOAK

SENIOR VP & GENERAL COUNSEL





SHELTER-IN-PLACE CONSUMPTION, DELIVERY, & SMART REGULATION



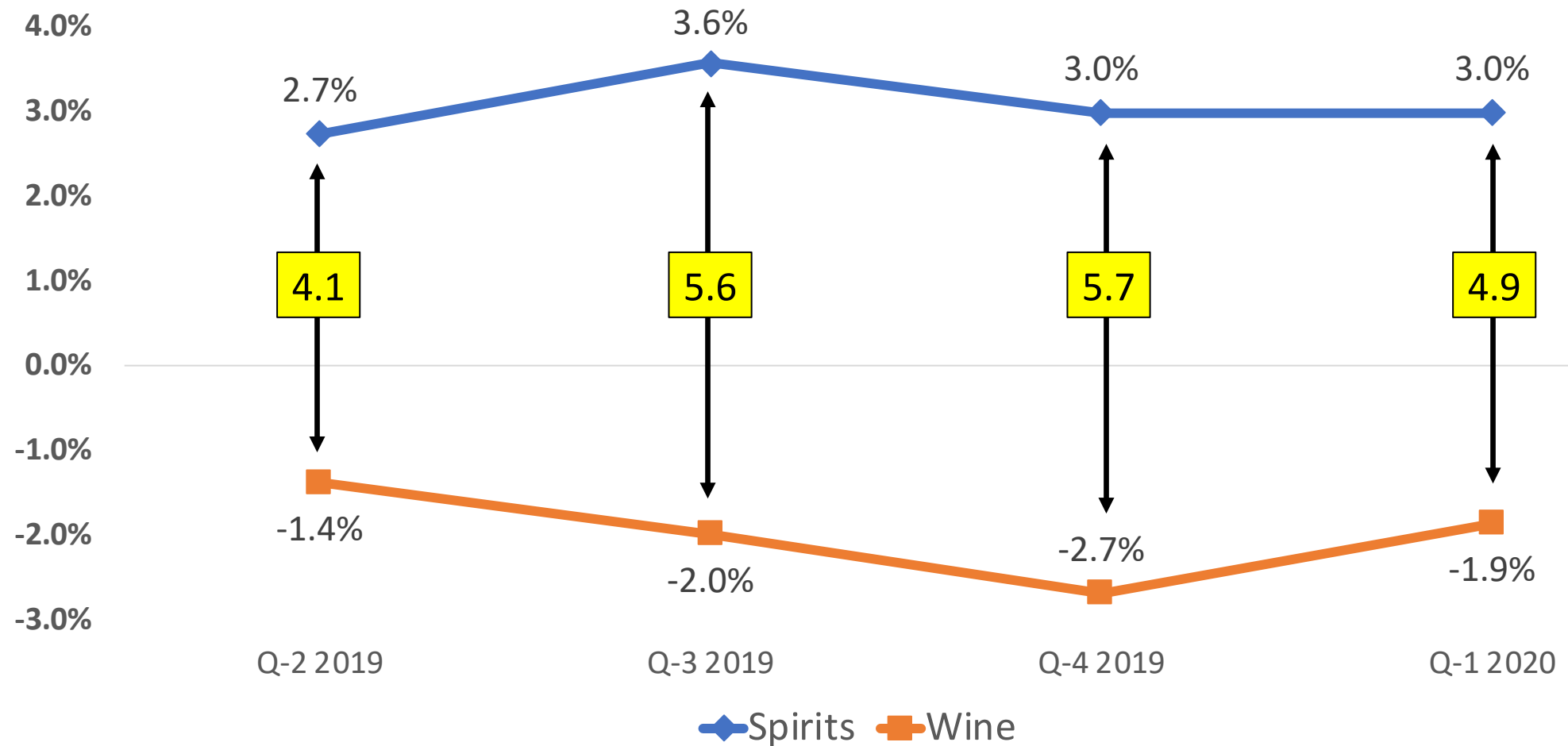
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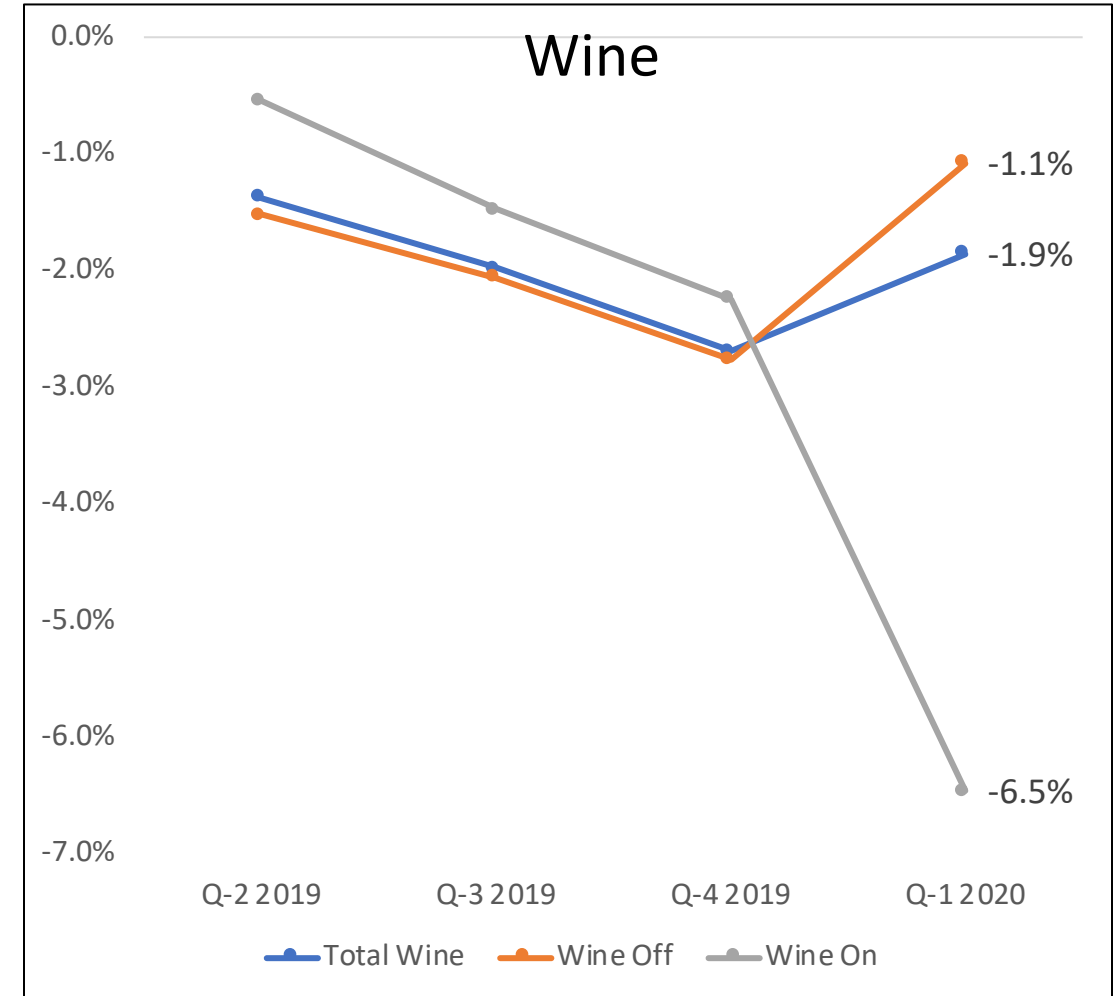
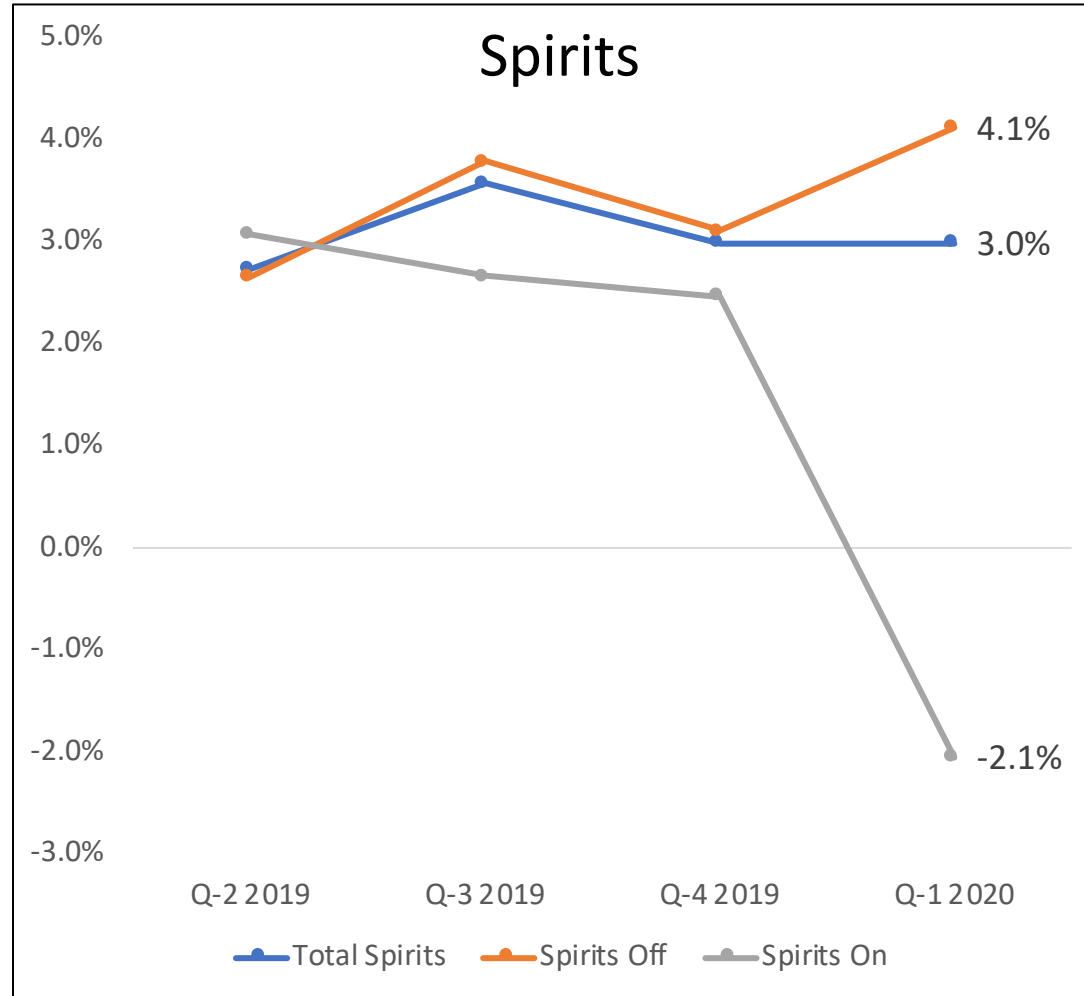
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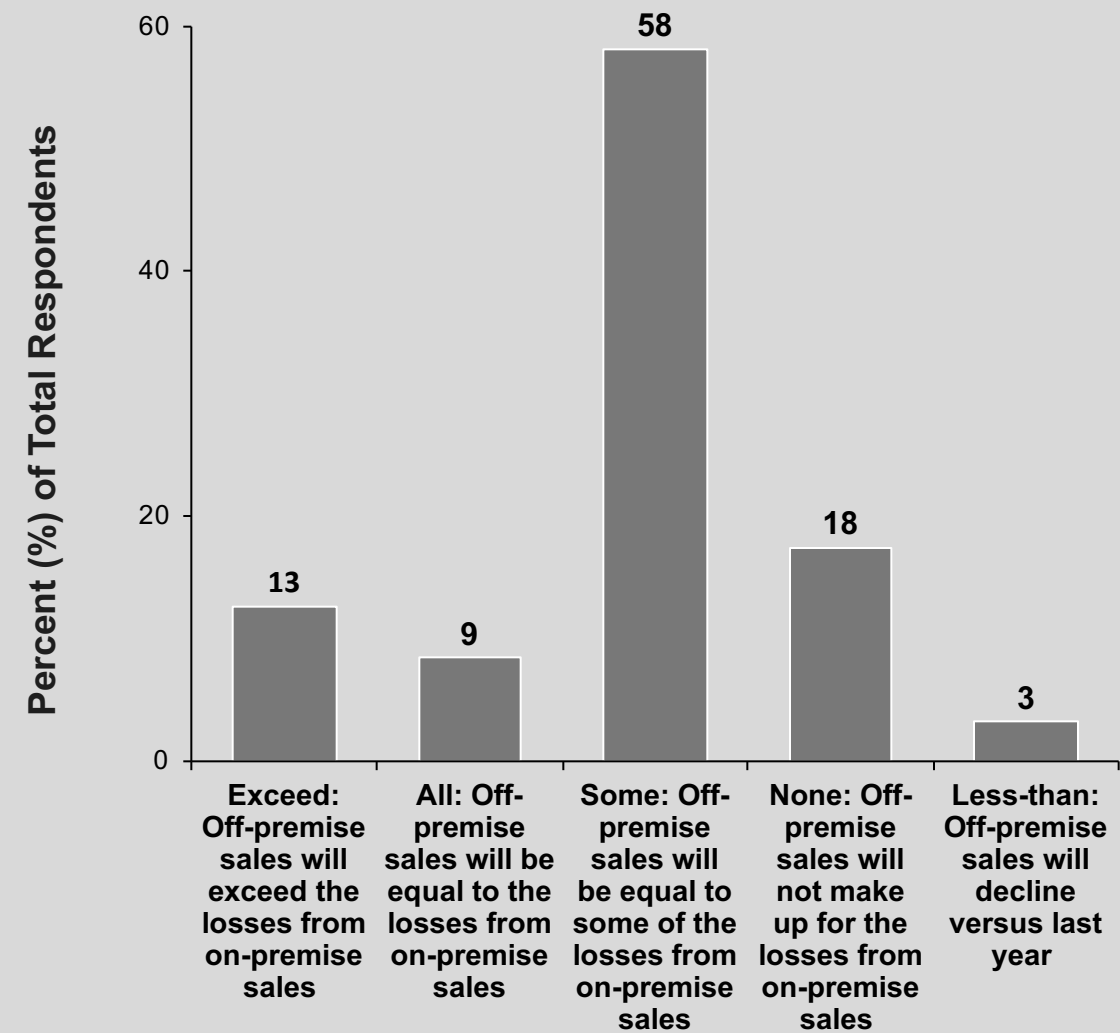
TREND DIVERGENCE REMAINS SIGNIFICANT-WINE STABLIZING



IMPACT OF SHELTER IN PLACE EVIDENT IN Q-1 2020 DATA

Off-premise sales are only expected to make up for some of the on-premise sales losses due to pandemic related business closures

% Total respondents predicting ability of off-premise sales to make up for on-premise losses due to COVID-19



Respondents expect that off-premise sales will remain high enough to offset some, but not all, of the on-premise losses from stay-at-home guidelines and bar / restaurant closures due to COVID-19

Question: Premise Impact: To what degree do you expect to make up the loss of on-premise beverage alcohol sales due to the closure of establishments during the current COVID-19 pandemic with off-premise sales (based on 2019 share)?

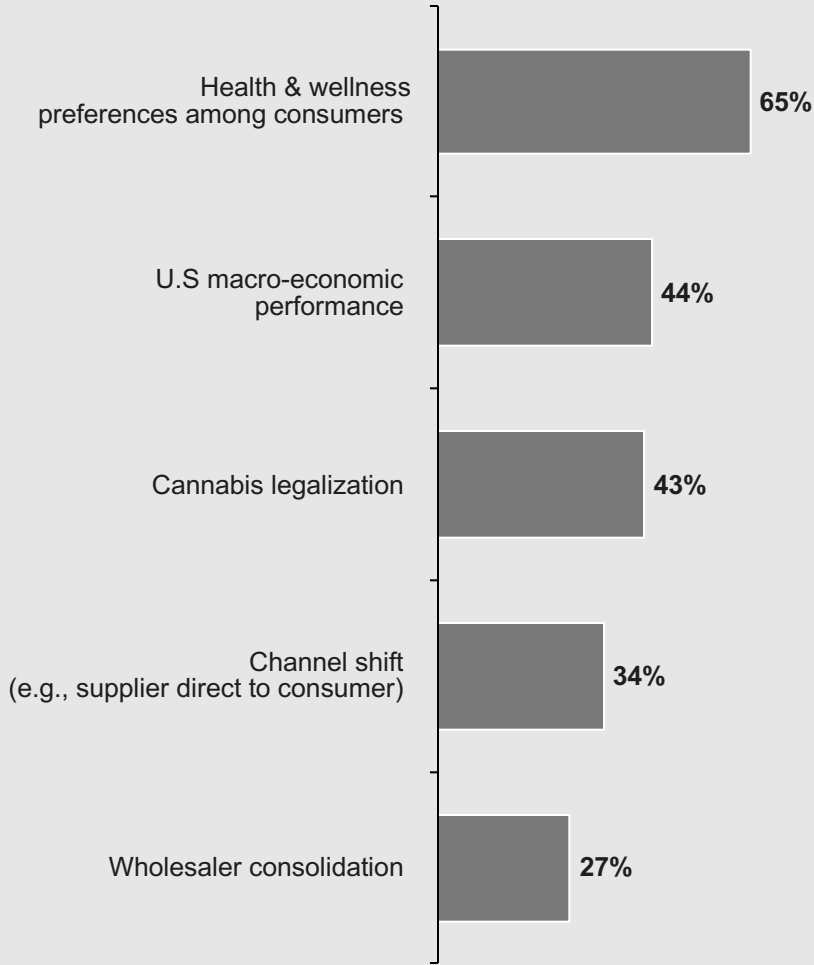
Growth

1. All numbers based on individual responses unless otherwise noted
2. N/A responses filtered out
Source: Kearney Survey results

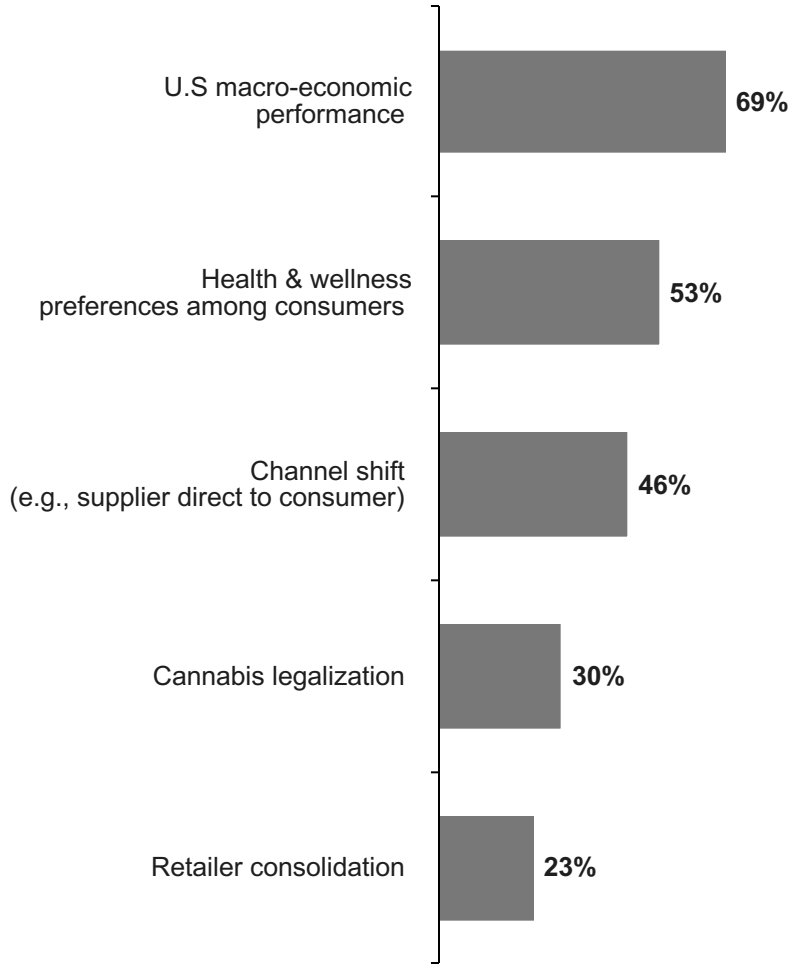
Current economic conditions have caused a stark re-ranking of headwinds

Concerns about the impact of cannabis legalization on beverage alcohol are tempering

Top 5 potential HEADWIND to growth – Q3, ‘19
(% of total respondents)



Top 5 potential HEADWIND to growth – Q1, ‘20
(% of total respondents)

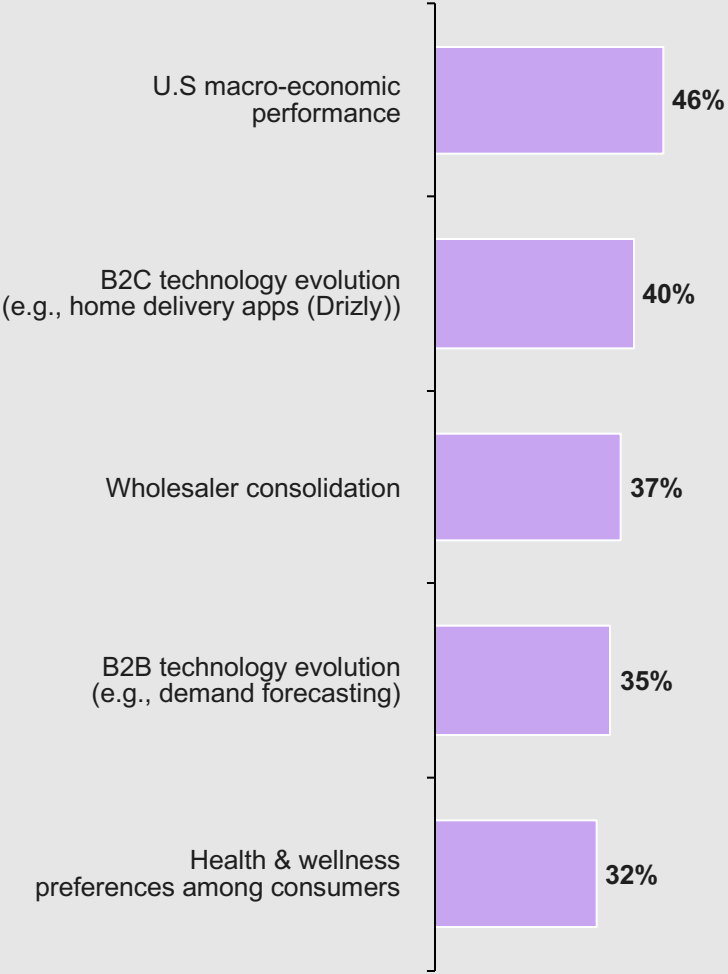


Question: Company Growth: What do you see as the highest potential HEADWIND to the growth of your company in the next 12 months?
1. All numbers based on individual responses unless otherwise noted; N/A responses filtered out
Source: Kearney Survey results

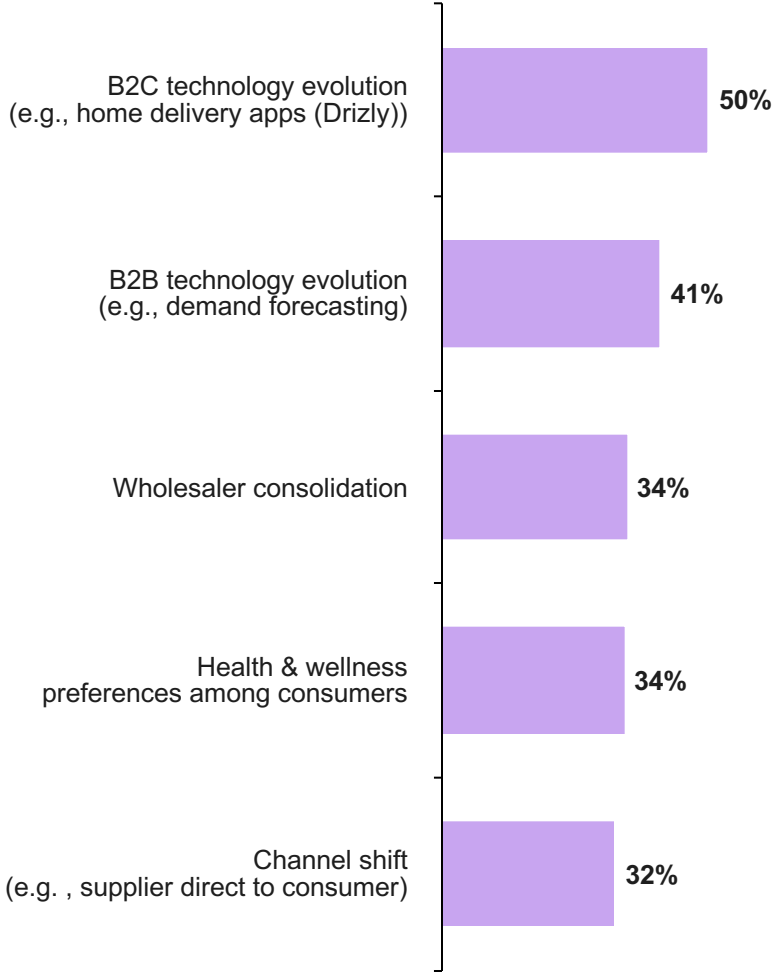
Technology evolution has replaced economic performance as the major tailwind of 2020

Technology and channel shifts are expected to put wind in the sails of the industry

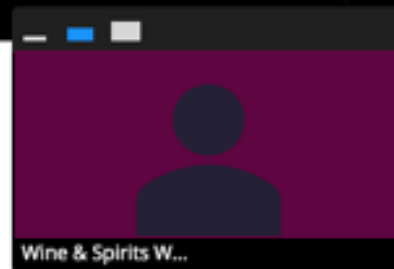
Top 5 potential TAILWIND to growth – Q3, ‘19
(% of total respondents)



Top 5 potential TAILWIND to growth – Q1, ‘20
(% of total respondents)



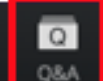
Question: Company Growth: What do you see as the highest potential TAILWIND to the growth of your company in the next 12 months?
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Q & A

UNFORTUNATELY, WE CAN ONLY ACCEPT WRITTEN QUESTIONS SUBMITTED THROUGH THE ZOOM APP.

PLEASE FIND THE "Q&A" BUTTON AT THE BOTTOM OF YOUR SCREEN TO BRING UP A CHAT BOX AND SUBMIT YOUR QUESTION.



THANK YOU!

MEDIA INQUIRIES: SEND FOLLOW UP QUESTIONS TO
MICHAEL BILELLO AT **MICHAEL@WSWA.ORG**

TO LEARN MORE ABOUT THE VALUE OF **MEMBERSHIP** WITH WSWA:
CONTACT BOB WIGGANS AT **BOB@WSWA.ORG**

