

INTERNATIONAL MARKETING UPDATE

Honore Comfort, VP International Marketing

*Wine Institute Board of Directors
Annual Meeting
June 9, 2020*



COVID-19: Global Impact

- Global Trends:

- Retail sales up
- On-premise collapse
- Online surge

- US Wine Exports:

- Down -8.4% thru April
- High points:
 - *So. Korea +33.4%*
 - *Canada +10.6%*
 - *Sweden +34.8%*
- Lows:
 - *China -43%; Hong Kong -58%*



TDM data; 2020 YTD, US Dept Commerce

COVID-19: Global Impact – Market Variances



UK

- Importers rethink business models
- Drinking higher quality at home
- Impending lay-offs



Canada

- Liquor Boards struggle w/online
- Consumers return to “tried & true”
- Large formats



South Korea

- Consumption & purchase fell
- Rapid return to normal restaurants & retail

“Developed within the firestorm of COVID, these are turning into long-term programs...”



Virtual Education & Programming

Global Audience Reach:

- Over 25 countries
- 2,700+ participants
- 3,500+ registrations
- 20,000+ visits/clicks



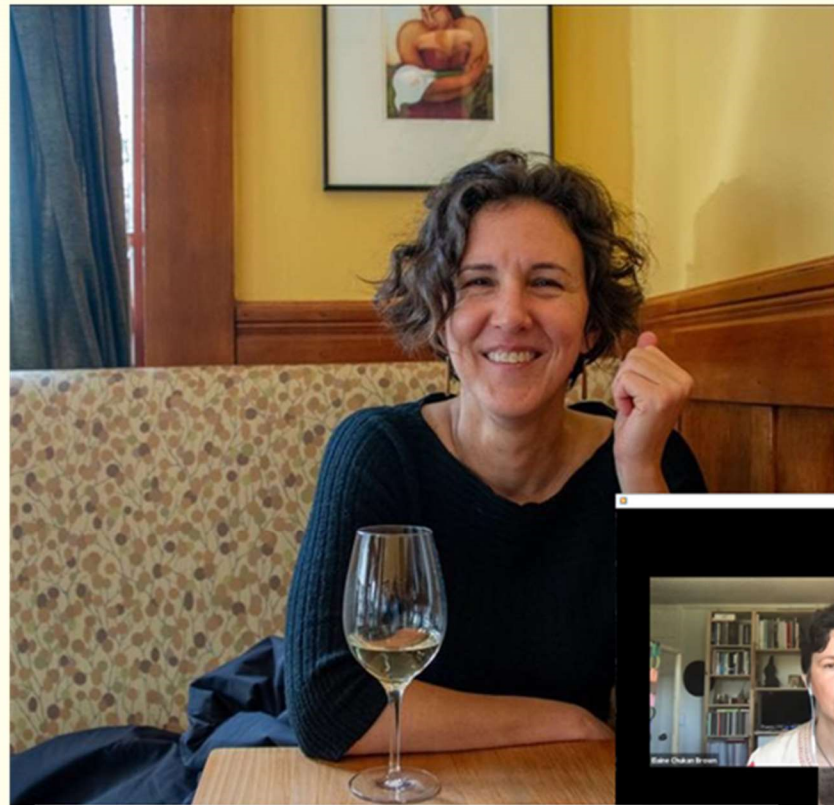
Webinars / Video Series

Behind the Wines

Inside California Winemaking

Market Intelligence Reports

Virtual Tastings



BEHIND THE WINES

Video Series

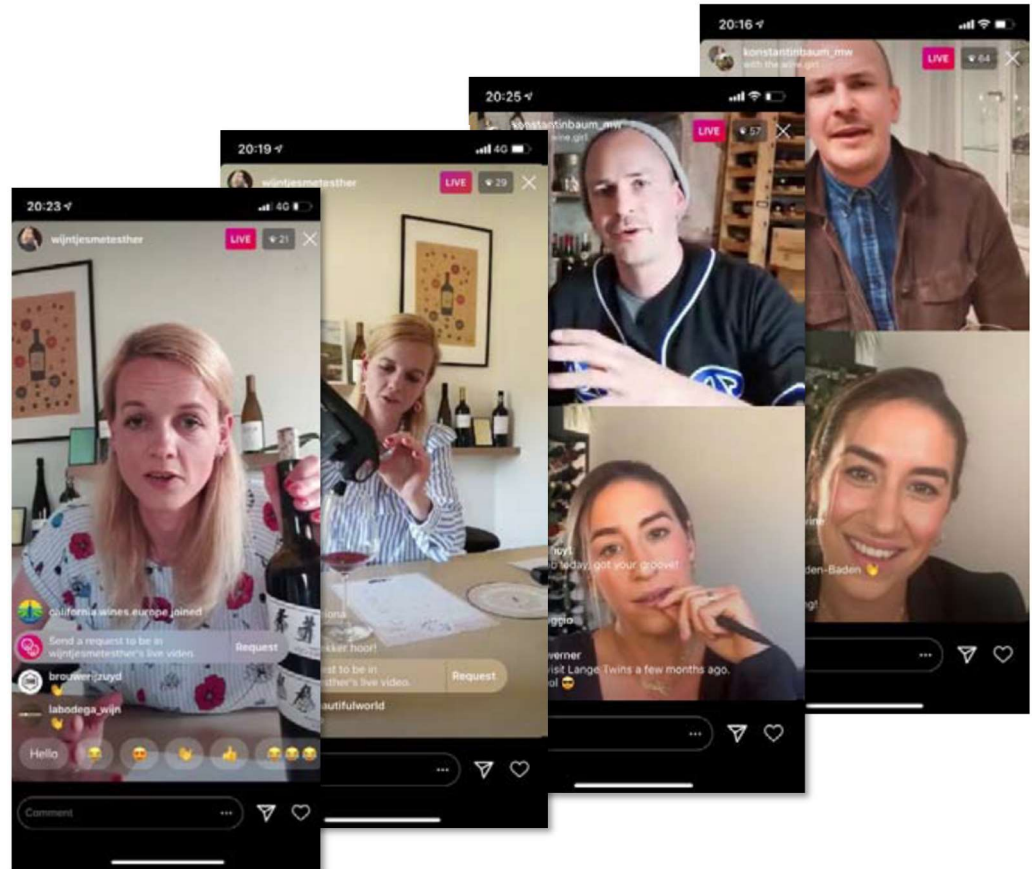
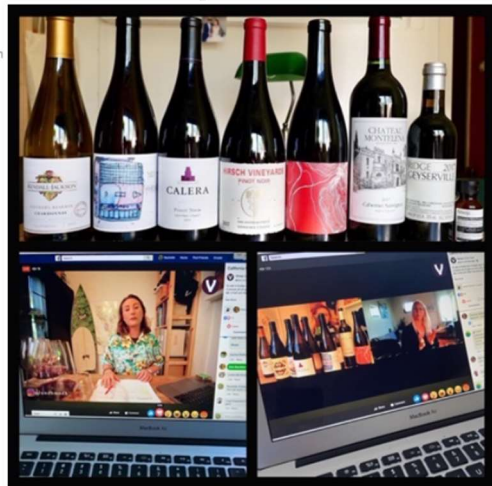
Tuesdays at 10am PDT



Date	Behind the Wines With Elaine Chukan Brown	Registrations
April 7	Episode 1 – Steve Matthiasson, Matthiasson Wines	462
April 14	Episode 2 – Jasmine Hirsch, Hirsch Vineyards and Guest Cathy Corison	610
April 21	Episode 3 – Rory Williams, Frog’s Leap & Calder Wine Company	548
April 28	Episode 4 – Hardy Wallace and Guest Steve Edmunds	552
April 28	Special Japanese Edition – Akiko Freeman, Freeman Winery	595
May 4	Episode 5 – Jason Haas, Tablas Creek Vineyard	214
May 11	Episode 6 – Randall Grahm, Bonny Doon Vineyard	280
May 19	Episode 7 – Paul Draper, Ridge Vineyards	433
May 26	Episode 8 – Carole Meredith and Steve Lagier, Lagier Meredith with Guest Anthony Truchard	286
June 2	Episode 9 – Tegan Passalacqua, Turley Cellars and Sandlands Vineyards	315



Virtual Tastings & Events



Global Digital & Social Media



pobeaudoin 20h

À DÉFAUT DE POUVOIR VOYAGER AU SOLEIL PRÉSENTEMENT, D'EN PROFITE POUR VOUS FAIRE DÉCOUVRIR UN DE MES VINS CALIFORIENS PRÉFÉRÉS QUE J'AI DÉCOUVERT IL Y A QUELQUES SEMAINES.

SWIPE UP POUR DÉCOUVRIR TOUS LES VINS CALIFORIENS DISPONIBLES À @LASAQ!

@CALIFORNIA.WINES.CANADA

#CALIFORNIANWINE #DISCOVERCALIFORNIANWINE #EARTHORY #AD

pobeaudoin 20h

CHEERS À LA JOURNÉE DE LA TERRE!

BIEN HEUREUX DE COLLABORER AUJOURD'HUI AVEC @CALIFORNIA.WINES.CANADA, UNE COMPAGNIE UTILISANT DES PRATIQUES ÉCO-RESPONSABLES ET SAINES POUR L'ENVIRONNEMENT, ET SURTOUT PARCE QUE QUI N'AIME PAS LE VIN?!

#JOURDELATERRE

#CALIFORNIANWINE #DISCOVERCALIFORNIANWINE @LASAQ #AD

California Wines Deutschland
Gepubliceerd door Poppy Social Media [?] · 1 hr · mei om 11:43 · 6

Wusstet ihr, dass die Falknerei auf der ganzen Welt bereits seit Tausenden von Jahren praktiziert wird? Und wusstet ihr, dass diese Raubvögel ursprünglich zur Jagd eingesetzt wurden, um Nahrung für ihre Herren zu fangen? Heute wenden sich viele Weinkellereien dieser uralten Kunst zu, um ihre Ernte zu schützen. Falken und Habichte werden als "Lockvögel" eingesetzt, was bedeutet, dass sie Starke und andere Vögel einfach verscheuchen, anstatt sie zu jagen. Ihre bloße Anwesenheit in der Gegend führt dazu, dass die anderen Vögel dem Weinberg fernbleiben und daran gehindert werden, die reifen Trauben zu fressen.

Abgebildet: Tony Pantaleo und Ezra
Foto: James Collier

California Wines Canada
Published by Poppy Social Media [?] · 1 hr · *
Join us LIVE on our Instagram @california.wines.canada tonight from 17 pm to 18 pm for a virtual tasting of Cabernet Sauvignon with the sommelier Dani Frisian and the influencer Sansdrick Lavoie, who will discuss sustainable practices, alright food and wines, and more. See you tonight 17!

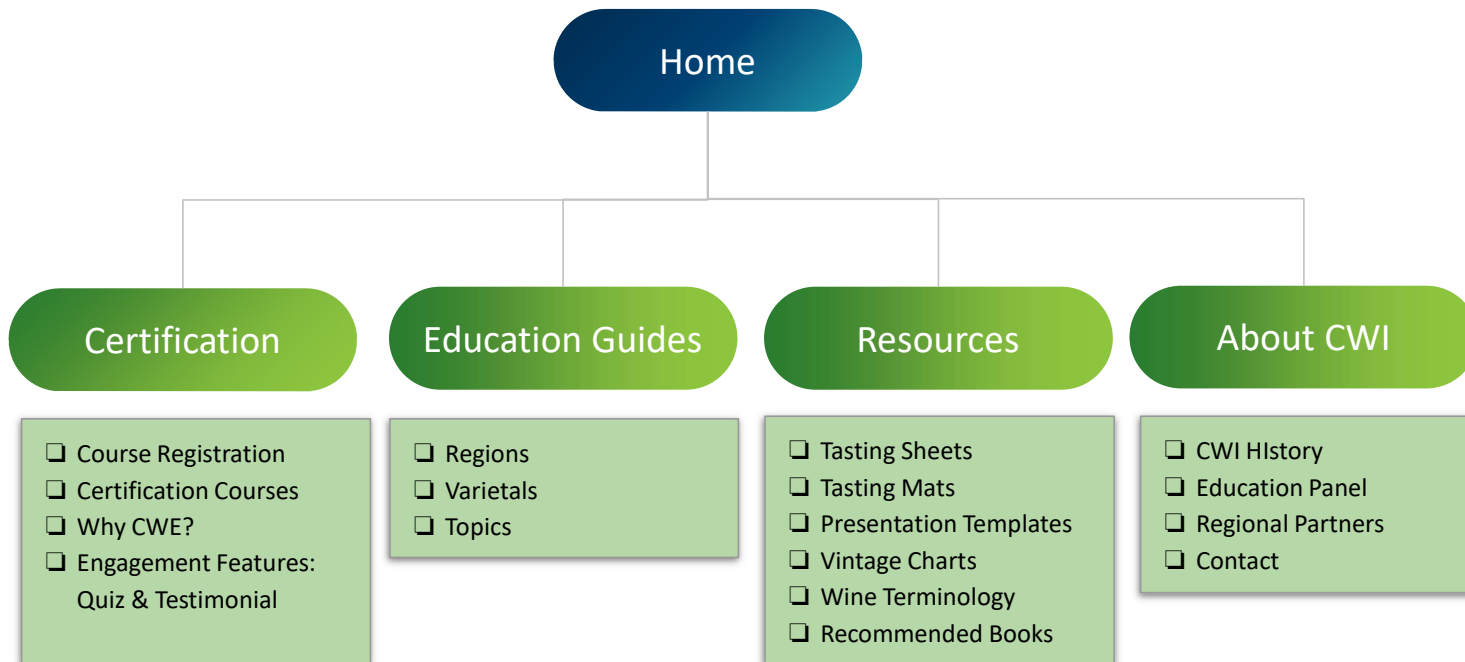
#CaliforniaWines #DiscoverCaliforniaWines #StayHome

* See original · Rate this translation



California Wine Education Program

- Unique online education platform for international markets
- A new “Gold Standard” for regional wine education for trade & consumers





Global Education Panel Developing Content

- Education panel of 20+ MW's, MS's, writers, and leading wine educators from around the world



Evan Goldstein
Master
Sommelier



Tim Gaiser
Master
Sommelier



Sandy Block
Master
of Wine



Madeline Triffon
Master Sommelier



Elaine Chukan Brown
Educator

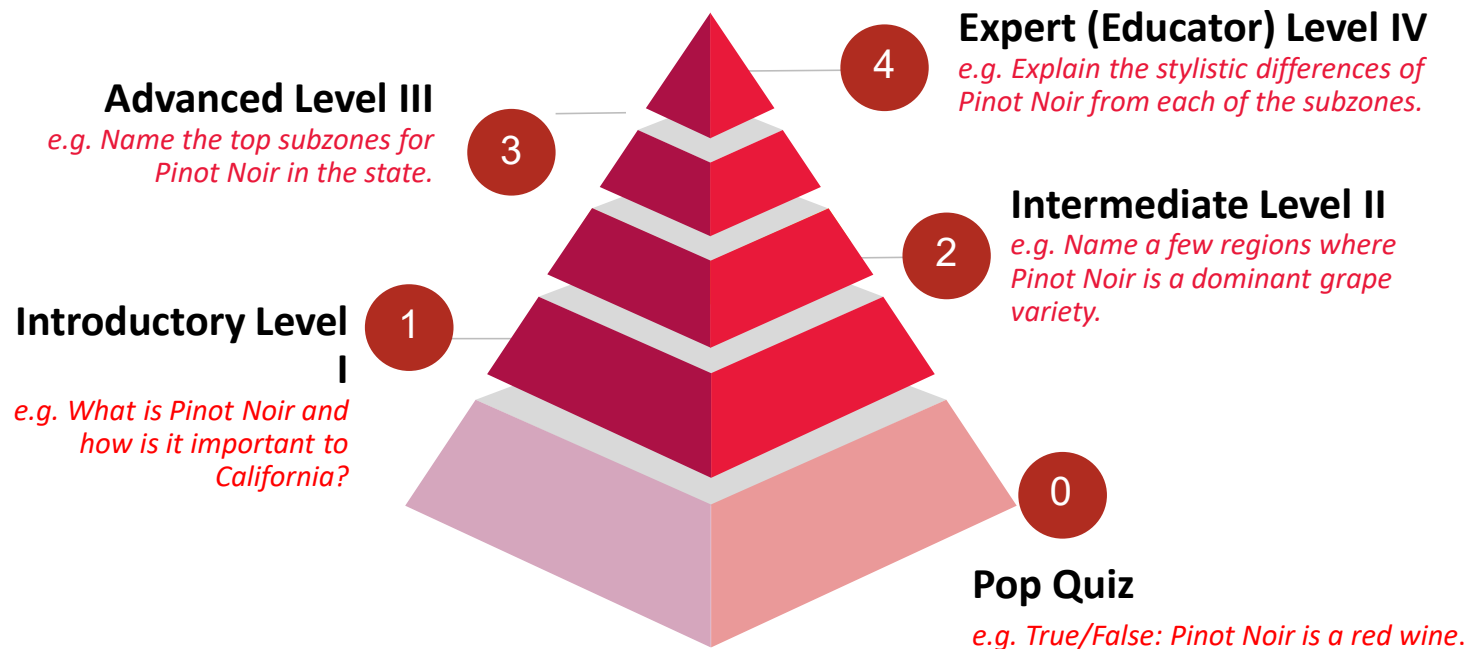


Peter Marks
Master of Wine



Rigorous 4-tier Certification Program

- Aligned with WSET, IMW & Court of Master Sommeliers
- Build a global team of certified CA wine ambassadors





Retail Partnerships - Costco



- Launched December 2019
- Promotions in 3 markets, 57 stores
 - Taiwan
 - UK
 - South Korea
- Holiday feature planned for Australia with advertorial
- Upcoming UK campaign





2030 Vision for California Wine Exports

1. Build Momentum in Current Markets
 - Retail Promotions
 - Digital Advertising
2. Expand New Markets
 - Active in 27 markets
 - Australia, UAE, Vietnam
3. Build the Business Case for Export
 - Mentor Program
 - Market Intelligence Series

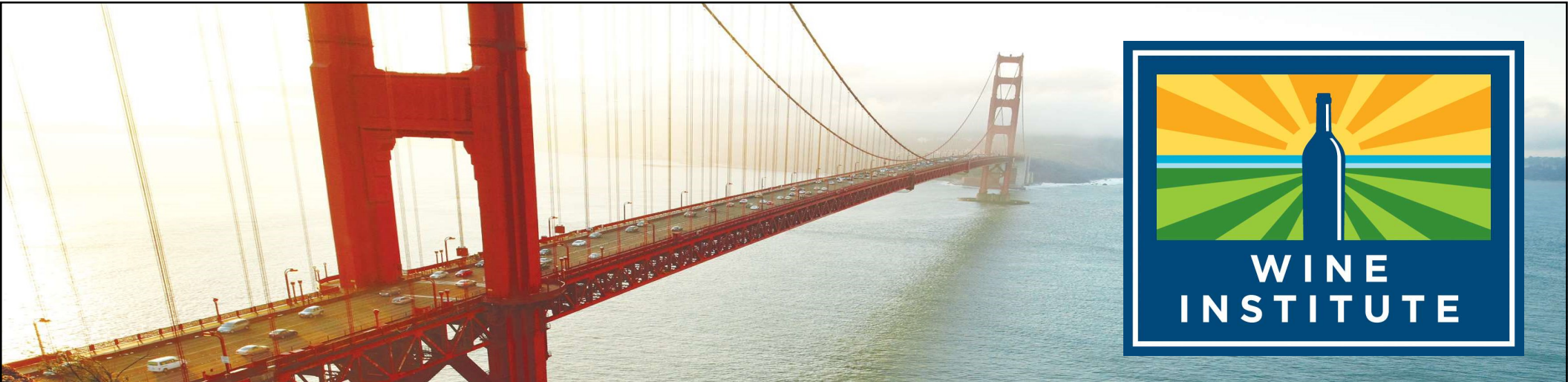




FY20-21: The Year Ahead

- Invest in Major Initiatives
 - Virtual & Digital
 - CA Wine Education Program
 - California Brand Refresh
- Spring/Summer 2021
 - Export 2021 Conference
 - Global Importer Meeting
 - Sustainability & Goals for Climate Action
 - International Exhibitions
- Fall 2021
 - *Eureka!* London





THANK YOU!

Honore Comfort, VP International Marketing