



INSPIRED BY OUR CLIENTS

DOING BUSINESS WITH SAQ

STÉPHANE DENIS ACCOUNT DIRECTOR
JULY 2020

DÉCOUVREZ
VOTRE PR



LE GOÛT DE PARTAGER

NOUVEL ARRIVAGE
10 VALEURS SÛRES

GENERAL INFORMATION



LE GOÛT DE PARTAGER

\$4B
NET
SALES

7,000
EMPLOYEES

3,100
SUPPLIERS

26,300
PRODUCTS

13,300
PRODUCTS
IN STORES

13,000
PRIVATE
IMPORT
PRODUCTS

262M
BOTTLES
SOLD

840
POINTS
OF SALE

3.7M
CARDS

inspire



SAQ

LE GOUT DE PARTAGER



81 countries

SALES BY CATEGORY

Celebrations

361.6M \$
+ 7,8%

Rosé Wine

106.3M \$
+ 6,0%

Red Wine

1 452.2M \$
+ 3,9%

White Wine

796.3M \$
+ 9,4%

Spirits

1 065.3M \$
+ 9,5%

TOTAL : 3 785 B \$
+7%

SAQ STORES ONLY

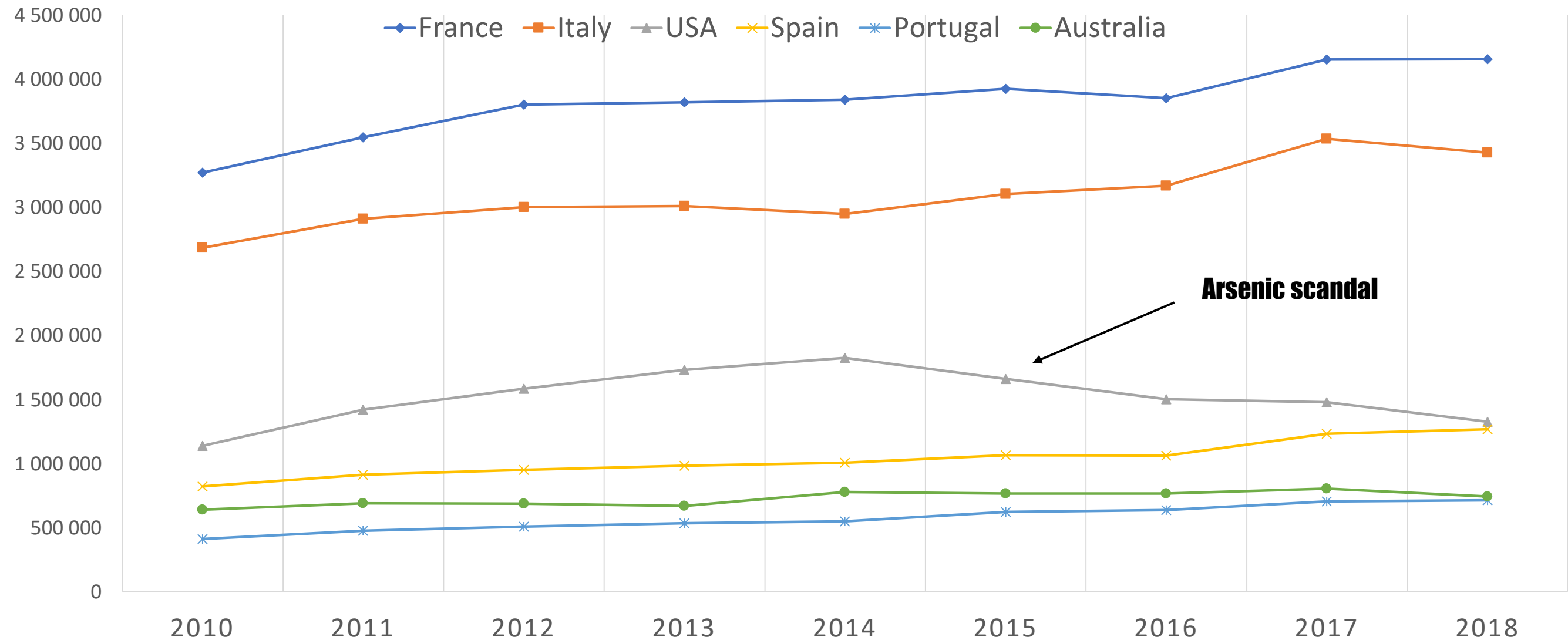
FINANCIAL YEAR 2019-2020



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LE GOÛT DE PARTAGER

2010-18 PROGRESSION BY COUNTRY 9L CS



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LE GOÛT DE PARTAGER

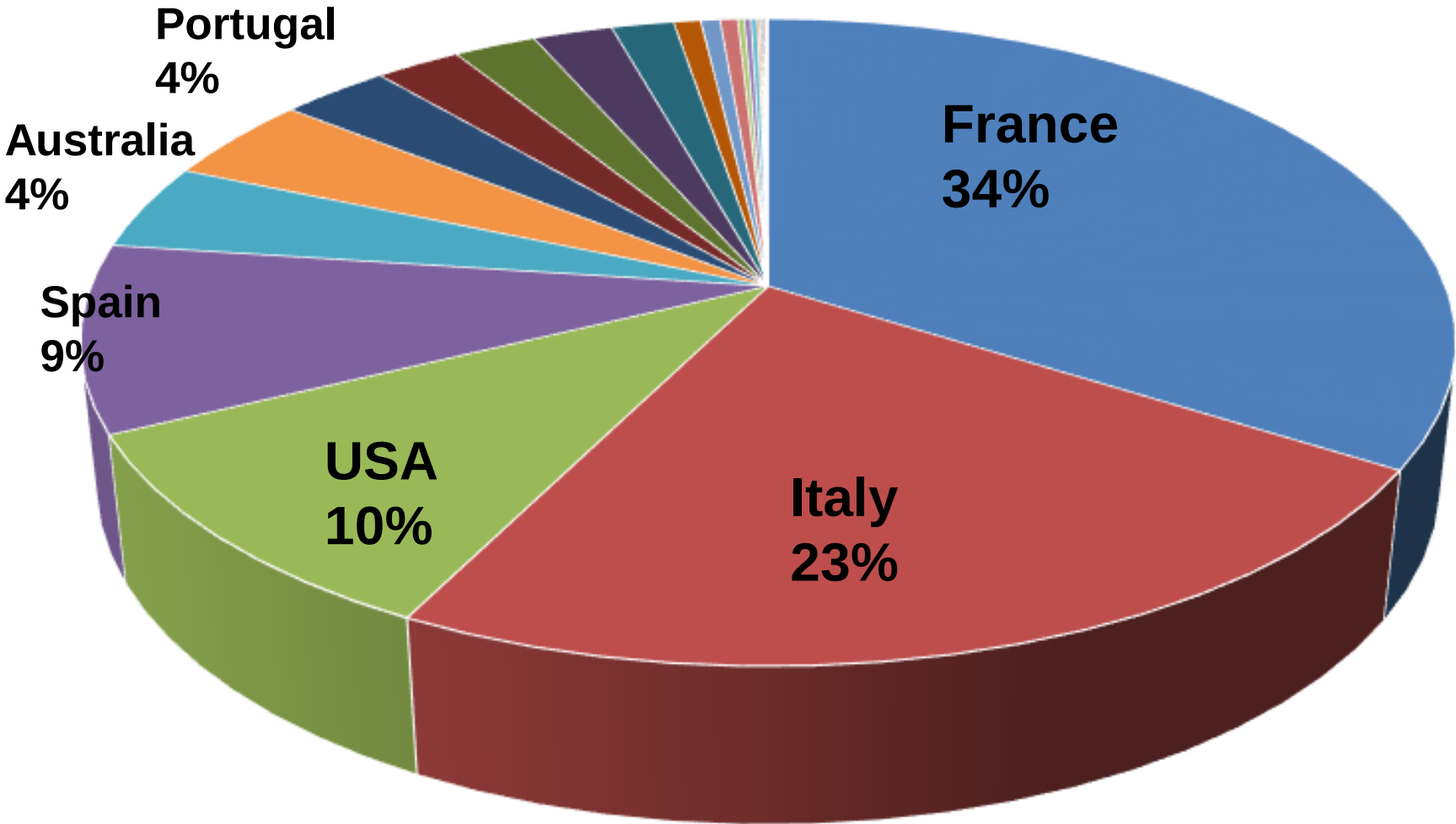
SAQ WINE SALES



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LE GOÛT DE PARTAGER

WINE SALES BY COUNTRY



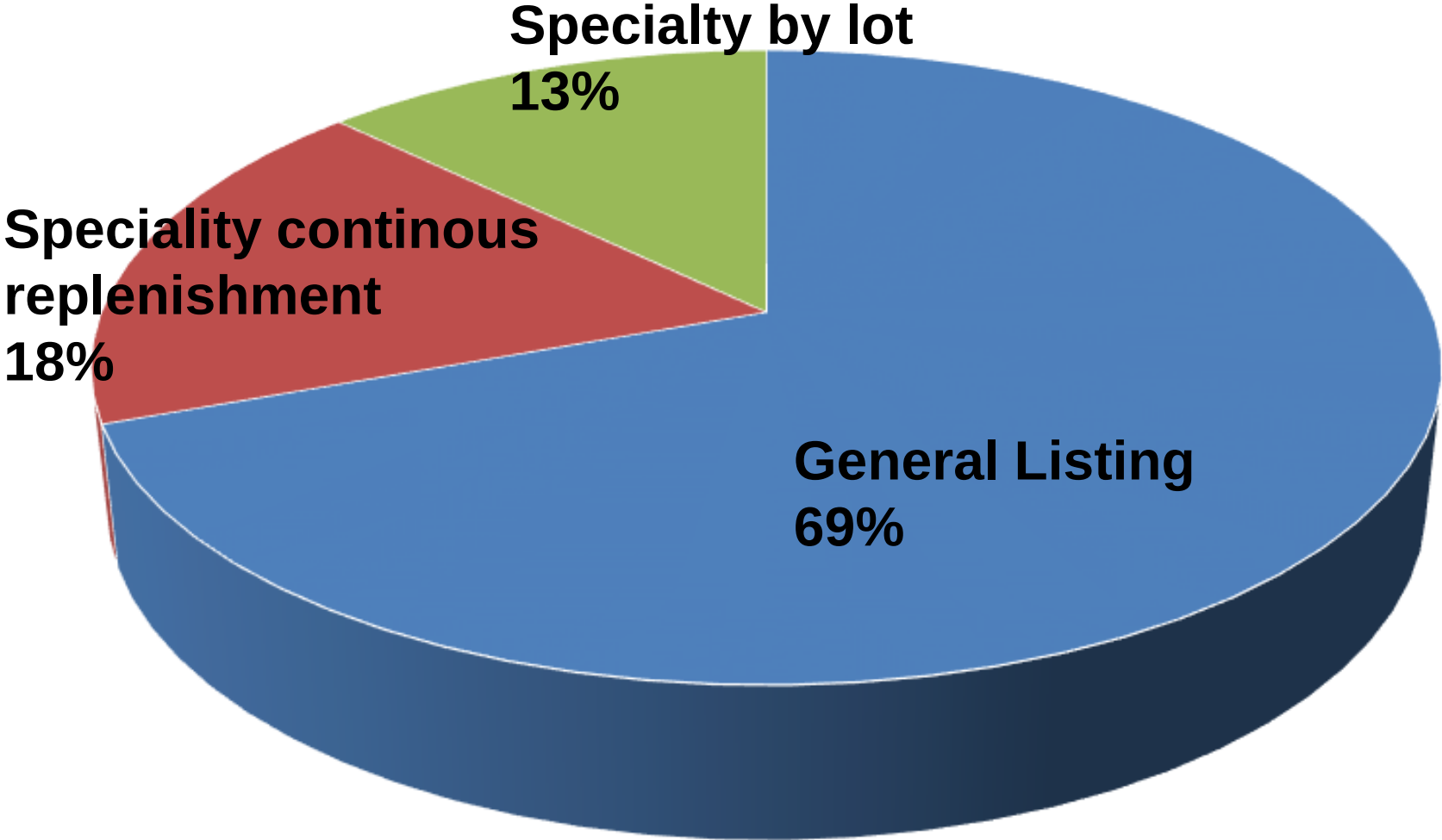
RED, ROSÉ & WHITE WINES

FINANCIAL YEAR 2019-2020



LE GOÛT DE PARTAGER

WINE SALES BY CHANNEL



Channel	Sales \$	Growth %
General listing	1 635 000 000 \$	3,4%
Specialty Continuous	418 000 000 \$	20,7%
Specialty by lot	301 000 000 \$	1,2%
Total	2 355 000 000 \$	5,8%

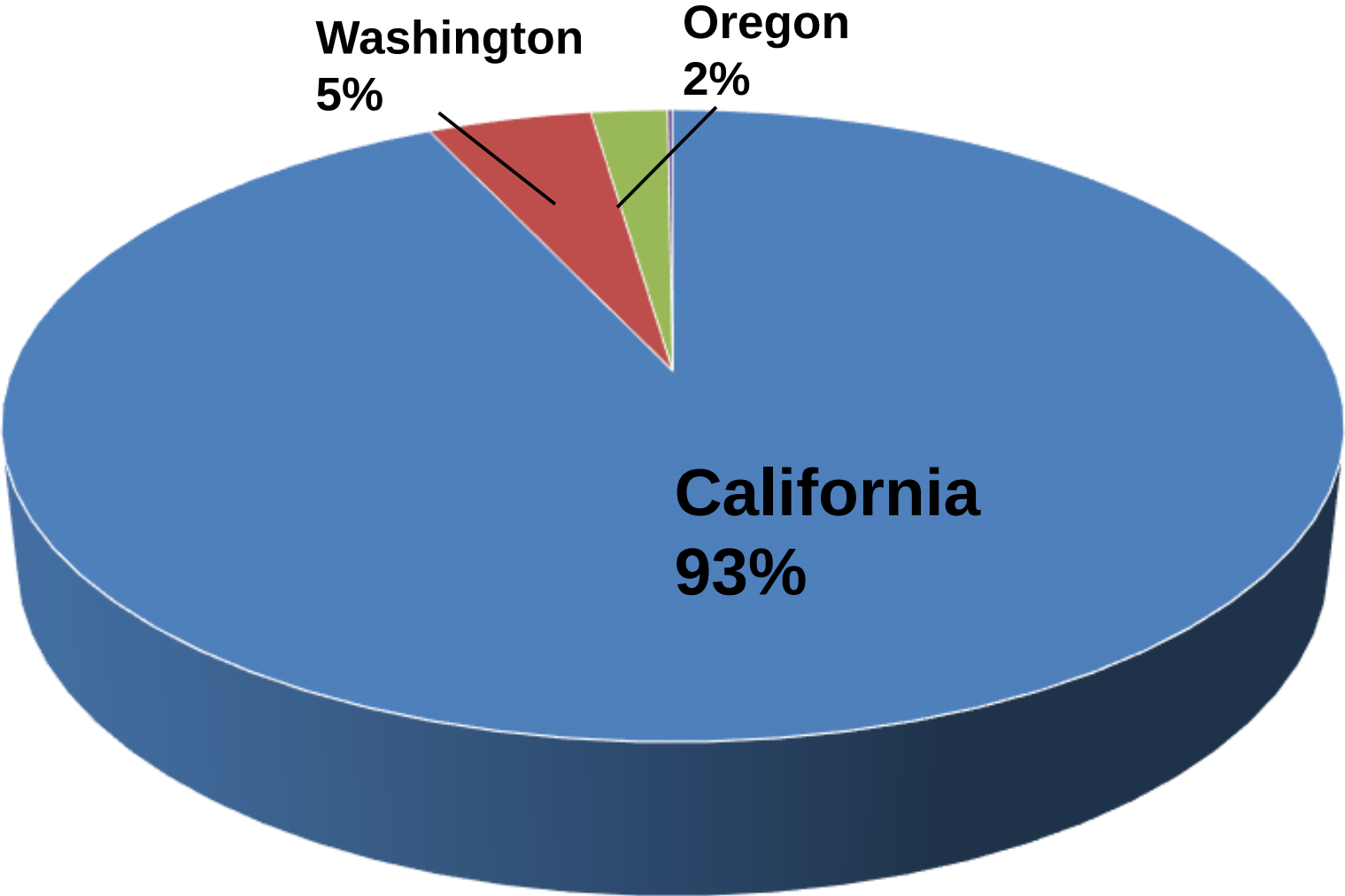
RED, ROSÉ & WHITE WINES

FINANCIAL YEAR 2019-2020



LE GOÛT DE PARTAGER

WINE SALES BY USA REGIONS



Region	Sales \$	Growth %
California	226 000 000 \$	-3,4%
Washington	11 000 000 \$	4,0%
Oregon	5 300 000 \$	21,5%
Other	375 000 \$	48,9%
Total général	243 000 000 \$	-2,6%

RED, ROSÉ & WHITE WINES

FINANCIAL YEAR 2019-2020



LE GOÛT DE PARTAGER

SAQ CALIFORNIA SALES



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LE GOÛT DE PARTAGER

CALIFORNIA

PRESENCE IN QUEBEC MARKET

3rd rank
Québec

\$226
millions
SALES

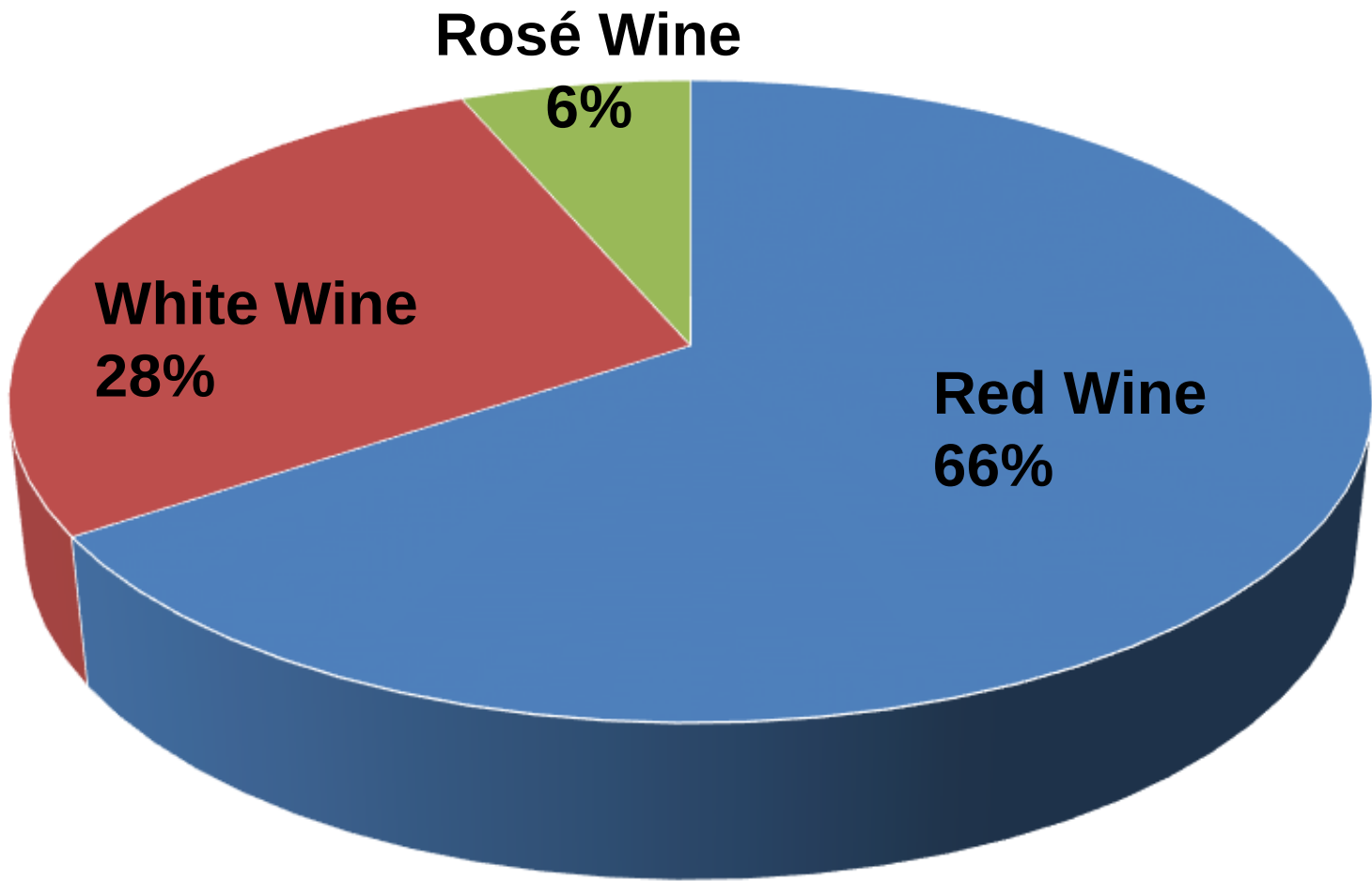
Over than
800
SKU



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LE GOÛT DE PARTAGER

CALIFORNIA SALES



Category	Sales \$	Growth %
Red	148 543 430 \$	-5,5%
White	63 177 671 \$	4,2%
Rosé	14 627 351 \$	-10,9%
Total général	226 348 452 \$	-3,4%

Price band	# skus	Sales \$	Growth %
A- Moins de 10.00 \$	7	8 989 722 \$	-12,8%
B- Entre 10.00 \$ et 11.95 \$	14	22 041 191 \$	-11,1%
C- Entre 12.00 \$ et 14.95 \$	33	47 819 927 \$	-5,9%
D- Entre 15.00 \$ et 17.45 \$	30	25 045 665 \$	2,4%
E- Entre 17.50 \$ et 19.95 \$	79	54 391 309 \$	-5,5%
F- Entre 20.00 \$ et 24.95 \$	93	30 938 428 \$	2,7%
G- Entre 25.00 \$ et 29.95 \$	102	13 900 921 \$	-1,3%
H- Entre 30.00 \$ et 39.75 \$	69	7 453 945 \$	4,2%
I- Entre 40.00 \$ et 49.75 \$	63	8 760 102 \$	1,0%
J- Entre 50.00 \$ et 74.75 \$	96	2 445 921 \$	26,5%
K- Entre 75.00 \$ et 99.75 \$	67	981 355 \$	43,0%
L- 100.00 \$ et plus	178	3 579 966 \$	-0,6%
Total général	831	226 348 452 \$	-3,4%

FINANCIAL YEAR 2019-2020



LE GOÛT DE PARTAGER

CALIFORNIA SALES

	General Listing			Specialty		
Price Band	# skus	Sales \$	Market Share	# skus	Sales \$	Market Share
A- Moins de 10.00 \$	5	8 898 952 \$	5%	2	90 770 \$	0%
B- Entre 10.00 \$ et 11.95 \$	11	21 432 003 \$	13%	3	609 188 \$	1%
C- Entre 12.00 \$ et 14.95 \$	27	46 925 440 \$	28%	6	894 487 \$	1%
D- Entre 15.00 \$ et 17.45 \$	15	22 104 465 \$	13%	15	2 941 201 \$	5%
E- Entre 17.50 \$ et 19.95 \$	20	44 325 305 \$	27%	59	10 066 004 \$	17%
F- Entre 20.00 \$ et 24.95 \$	3	13 864 406 \$	8%	90	17 074 022 \$	28%
G- Entre 25.00 \$ et 29.95 \$	1	2 019 215 \$	1%	101	11 881 706 \$	20%
H- Entre 30.00 \$ et 39.75 \$	1	624 986 \$	0%	68	6 828 959 \$	11%
I- Entre 40.00 \$ et 49.75 \$	3	5 839 833 \$	4%	60	2 920 269 \$	5%
J- Entre 50.00 \$ et 74.75 \$			0%	96	2 445 921 \$	4%
K- Entre 75.00 \$ et 99.75 \$			0%	67	981 355 \$	2%
L- 100.00 \$ et plus			0%	178	3 579 966 \$	6%
Total	86	166 034 603 \$	100%	745	60 313 849 \$	100%

**WINES BELOW 20\$
REPRESENT 70% OF THE
SALES IN VALUE, 80% OF
VOLUME**

FINANCIAL YEAR 2019-2020



LE GOÛT DE PARTAGER

CALIFORNIA SALES

RED WINES

Varietal	Sales \$	Market share	Growth %
Cabernet-sauvignon	63 281 355 \$	43%	2,1%
Blend	47 365 234 \$	32%	-10,8%
Pinot noir	17 705 870 \$	12%	0,7%
Zinfandel	8 116 558 \$	5%	-24,9%
Syrah	7 608 855 \$	5%	-11,1%
Merlot	3 730 796 \$	3%	-15,3%
Petite sirah	617 309 \$	0,5%	-6,3%
Grenache	39 113 \$	0,03%	-
Cabernet franc	32 441 \$	0,02%	-
Mourvèdre	26 430 \$	0,02%	-42,6%
Total	148 523 961 \$	100,00%	-5,5%

WHITE WINES

Varietal	Sales \$	Market share	Growth %
Chardonnay	38 311 354 \$	61%	10,0%
Pinot gris	8 778 355 \$	14%	-7,7%
Blend	6 677 165 \$	11%	13,3%
Sauvignon blanc	5 933 245 \$	9%	-4,8%
Moscato	2 960 942 \$	5%	-3,2%
Chenin blanc	309 863 \$	0,5%	10,4%
Viognier	132 949 \$	0,2%	-62,1%
Colombard	64 811 \$	0,1%	-85,0%
Albarino	4 804 \$	0,01%	0,0%
Total	63 173 488 \$	100,00%	4,3%

**CHARDONNAY AND CABERNET-SAUVIGNON EACH DOMINATE THEIR OWN CATEGORY
(MONO-VARIETAL)**

FINANCIAL YEAR 2019-2020



LE GOÛT DE PARTAGER

CALIFORNIA SALES

Sugar level	Sales \$	Market share	Growth %
-	4 922 626 \$	2%	
A- Moins de 2 g/l	12 503 723 \$	5,5%	3,8%
B- 2 à 3,9 g/l	39 139 776 \$	17%	1,6%
C- 4 à 5,9 g/l	60 949 189 \$	27%	3,6%
D- 6 à 9,9 g/l	66 033 943 \$	29%	-8,0%
E- 10 à 19,9 g/L	25 434 424 \$	11%	-19,8%
F- 20 à 49,9 g/L	14 006 510 \$	6%	-13,7%
G- 50 à 99 g/l	3 334 609 \$	1,5%	-1,7%
Total général	226 324 801 \$	100,00%	-3,3%

**KEEPING A LOW LEVEL
OF SUGAR IS KEY**

FINANCIAL YEAR 2019-2020



LE GOÛT DE PARTAGER

TRENDS

Organic

Natural, orange wine

Vegan

Low sugar

Low alcohol

Local bottling

"Good for me"

"Good for the planet"

BIB or alternative packaging

Local & craft products

Lighter bodied, easy to drink



LE GOÛT DE PARTAGER

SAQ INSPIRE



LE GOÛT DE PARTAGER

SAQ INSPIRE

**PENETRATION
OF THE QUEBEC
MARKET**

Quebec
population
8.4M

(6.8M age 18 and over)

Quebecers who
consume alcohol
5.6M

(82 % des 18 ans et +)

SAQ customers
5.0M

SAQ Inspire
cardholders
3.7M

61%
Transactions



70% Sales



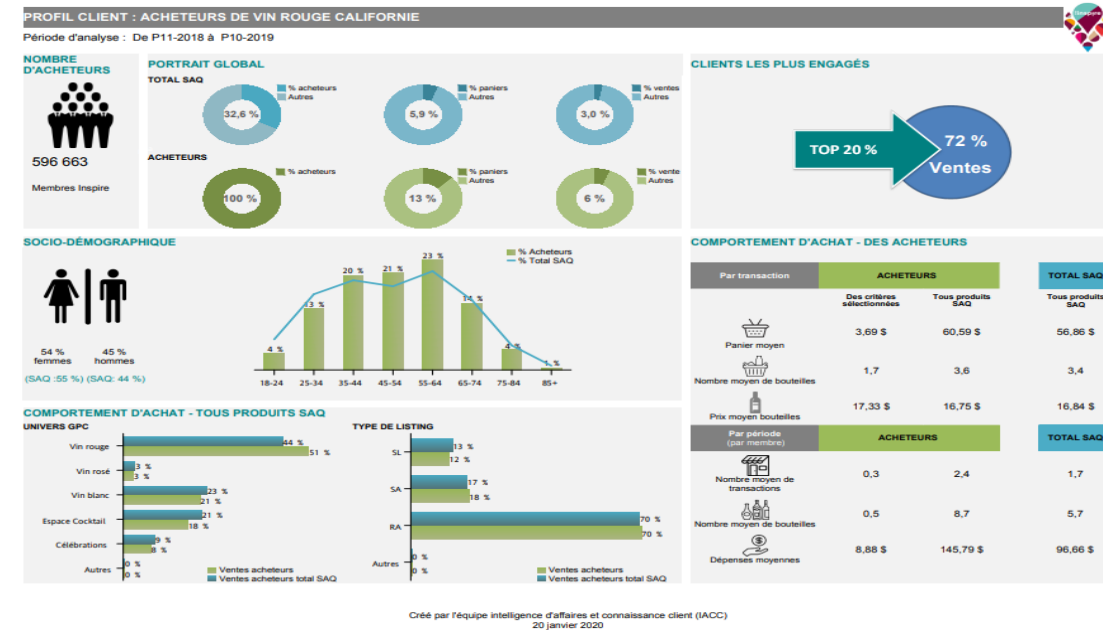
LE GOÛT DE PARTAGER

CUSTOMER PROFILE INFORMATION

To be shared with our partners to develop market knowledge and meet client's expectations

Available for :

- **Category:** (american wines, whisky, sparkling wines,...)
- **Supplier's portfolio**
- **Any product**



LE GOÛT DE PARTAGER

PROFIL CLIENT : ACHETEURS DE VIN ROUGE CALIFORNIE

Période d'analyse : De P11-2018 à P10-2019



Perte de
100K
clients

NOMBRE D'ACHETEURS

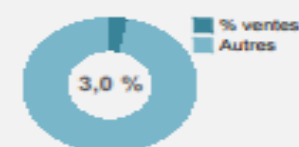
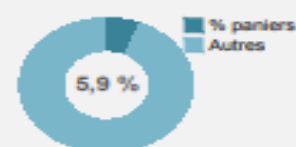
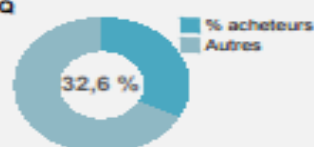


596 663

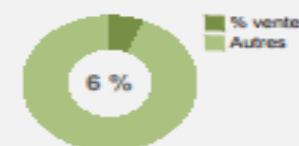
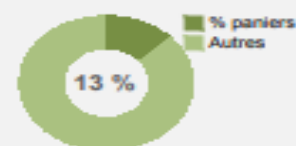
Membres Inspire

PORTRAIT GLOBAL

TOTAL SAQ



ACHETEURS



CLIENTS LES PLUS ENGAGÉS

TOP 20 %

72 %
Ventes

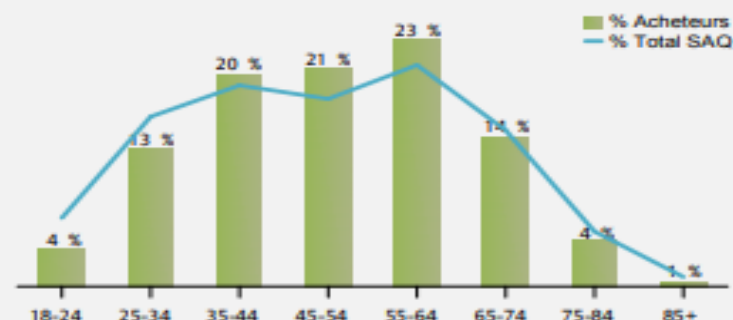
SOCIO-DÉMOGRAPHIQUE



54 %
femmes

45 %
hommes

(SAQ : 55 %) (SAQ : 44 %)

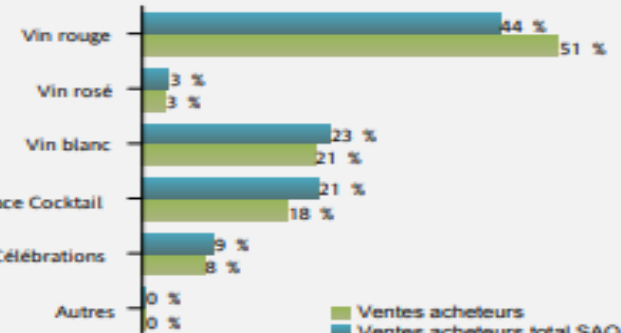


COMPORTEMENT D'ACHAT - DES ACHETEURS

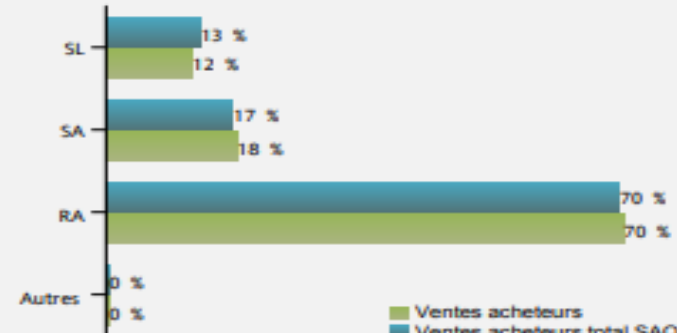
Par transaction	ACHETEURS		TOTAL SAQ
	Des critères sélectionnées	Tous produits SAQ	Tous produits SAQ
Panier moyen	3,69 \$	60,59 \$	56,86 \$
Nombre moyen de bouteilles	1,7	3,6	3,4
Prix moyen bouteilles	17,33 \$	16,75 \$	16,84 \$
Par période (par membre)	ACHETEURS		TOTAL SAQ
Nombre moyen de transactions	0,3	2,4	1,7
Nombre moyen de bouteilles	0,5	8,7	5,7
Dépenses moyennes	8,88 \$	145,79 \$	96,66 \$

COMPORTEMENT D'ACHAT - TOUS PRODUITS SAQ

UNIVERS GPC



TYPE DE LISTING



Créé par l'équipe intelligence d'affaires et connaissance client (IACC)
20 janvier 2020

SAQ

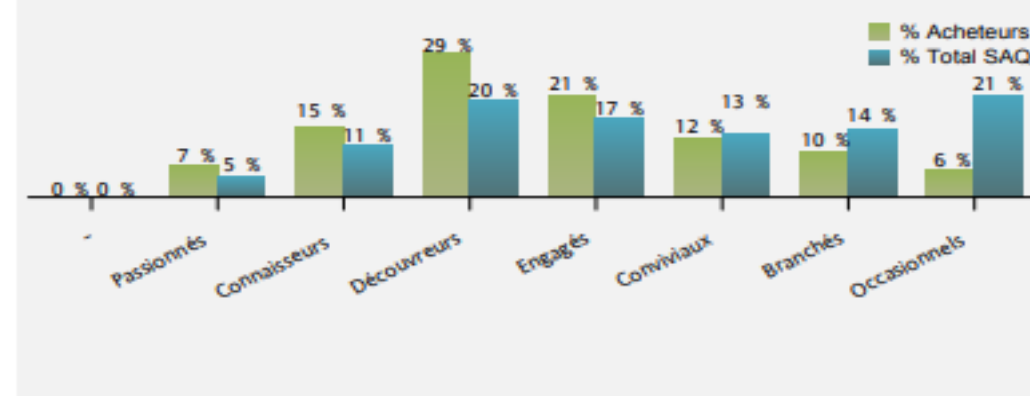
LE GOÛT DE PARTAGER

PROFIL CLIENT : ACHETEURS DE VIN ROUGE CALIFORNIE

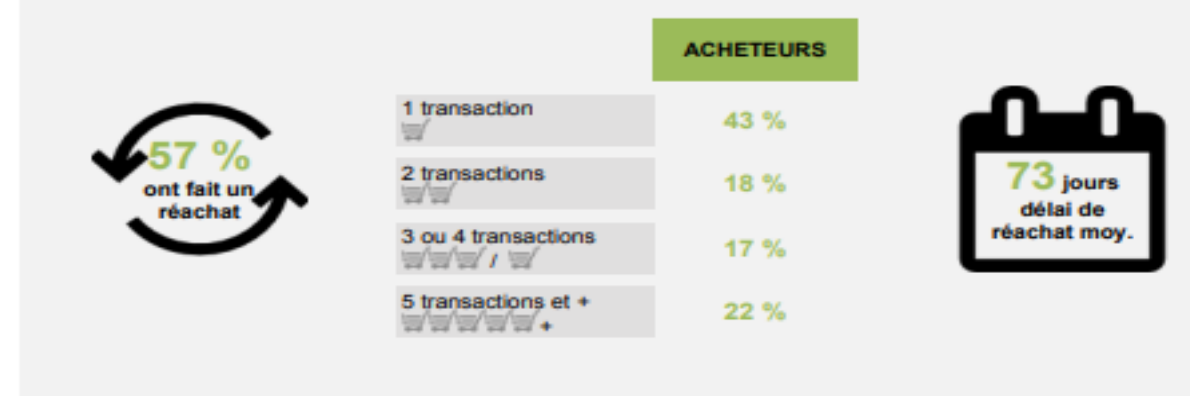
Période d'analyse : De P11 -2018 à P10-2019



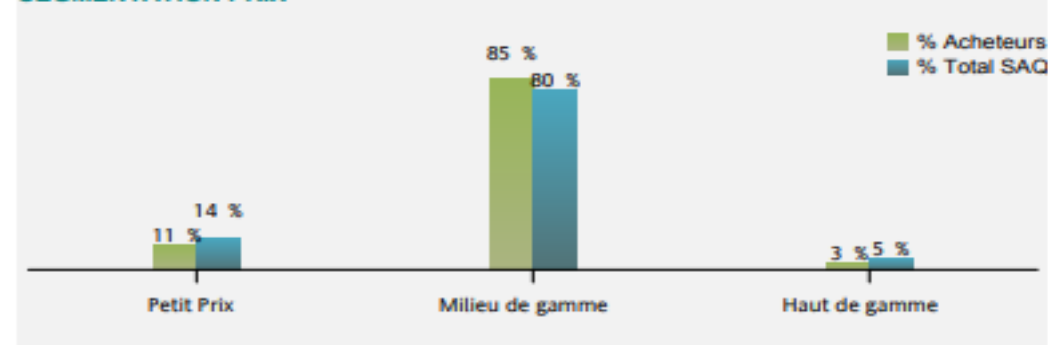
SEGMENTATION STYLE DE VIE



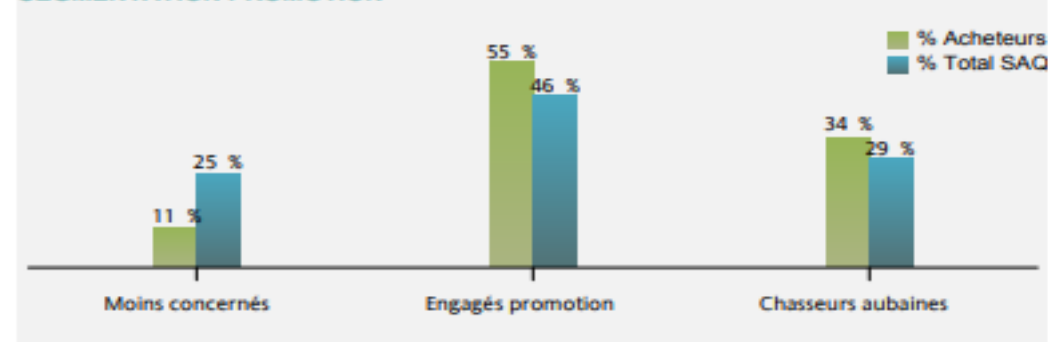
FRÉQUENCE ET DÉLAI DE RÉACHAT



SEGMENTATION PRIX



SEGMENTATION PROMOTION



COMPORTEMENT DES VISITES



Créé par l'équipe intelligence d'affaires et connaissance client (IACC)
20 janvier 2020

SAQ

LE GOÛT DE PARTAGER

PROFIL CLIENT : ACHETEURS DE VIN BLANC CALIFORNIE



Période d'analyse : De P11-2018 à P10-2019

NOMBRE D'ACHETEURS

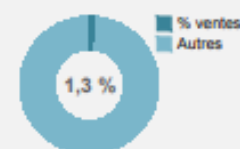
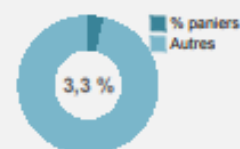
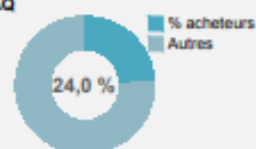


438 735

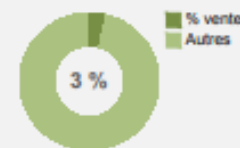
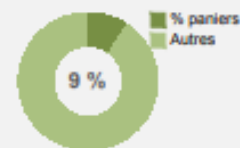
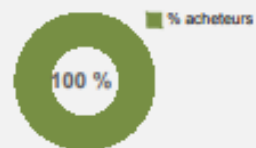
Membres Inspire

PORTRAIT GLOBAL

TOTAL SAQ



ACHETEURS



CLIENTS LES PLUS ENGAGÉS



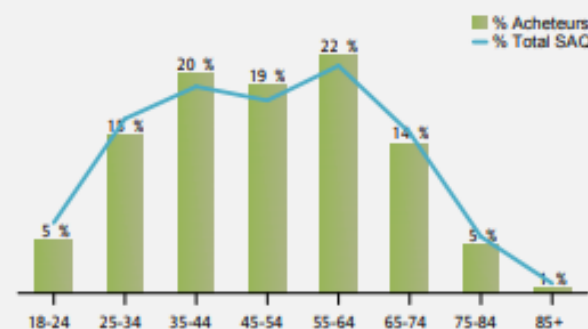
SOCIO-DÉMOGRAPHIQUE



58 %
femmes

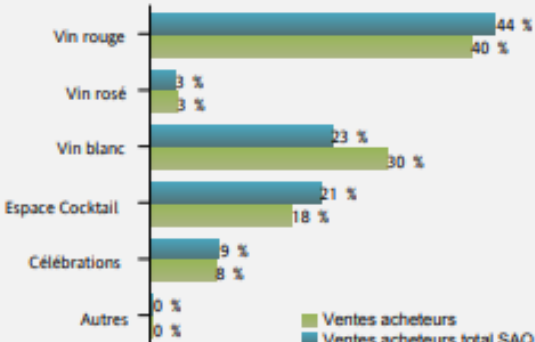
42 %
hommes

(SAQ : 55 %) (SAQ: 44 %)

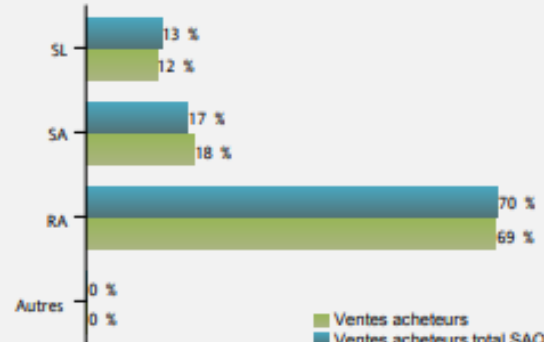


COMPORTEMENT D'ACHAT - TOUS PRODUITS SAQ

UNIVERS GPC



TYPE DE LISTING



COMPORTEMENT D'ACHAT - DES ACHETEURS

Par transaction	ACHETEURS		TOTAL SAQ
	Des critères sélectionnées	Tous produits SAQ	Tous produits SAQ
 Panier moyen	2,00 \$	58,50 \$	56,86 \$
 Nombre moyen de bouteilles	1,5	3,5	3,4
 Prix moyen bouteilles	14,71 \$	16,54 \$	16,84 \$
Par période (par membre)	ACHETEURS		TOTAL SAQ
 Nombre moyen de transactions	0,2	2,6	1,7
 Nombre moyen de bouteilles	0,3	9,1	5,7
 Dépenses moyennes	5,12 \$	149,86 \$	96,66 \$

Créé par l'équipe intelligence d'affaires et connaissance client (IACC)
20 janvier 2020

SAQ

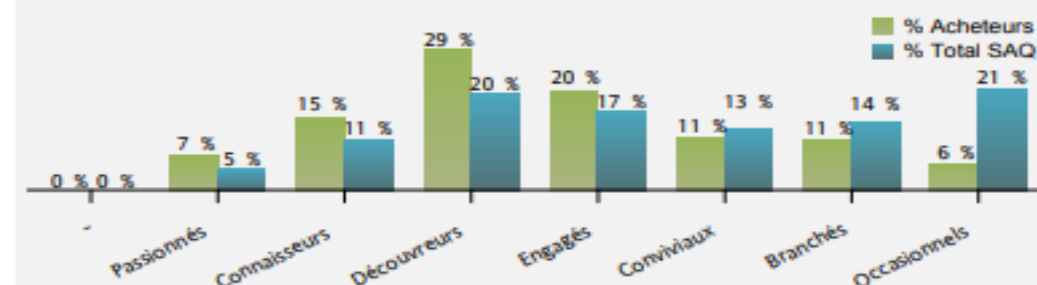
LE GOÛT DE PARTAGER

PROFIL CLIENT : ACHETEURS DE VIN BLANC CALIFORNIE

Période d'analyse : De P11 -2018 à P10-2019



SEGMENTATION STYLE DE VIE



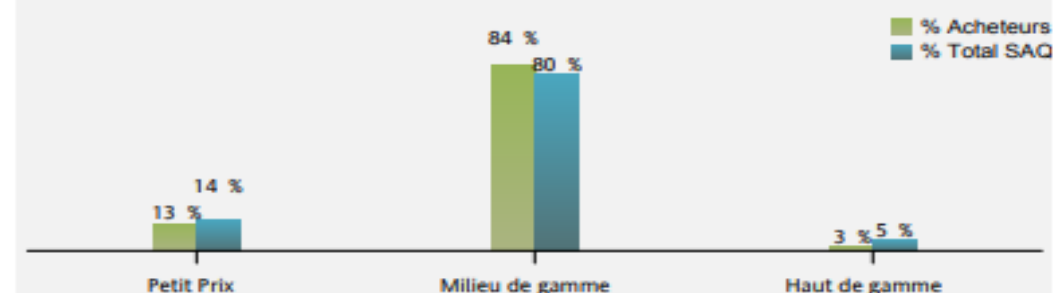
FRÉQUENCE ET DÉLAI DE RÉACHAT



ACHETEURS	
1 transaction	52 %
2 transactions	19 %
3 ou 4 transactions	14 %
5 transactions et +	14 %

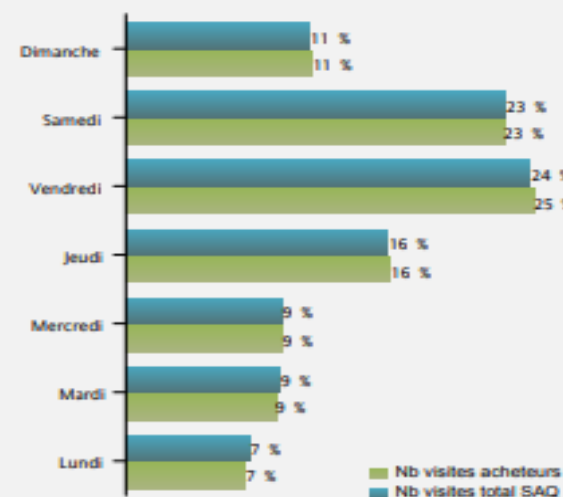


SEGMENTATION PRIX

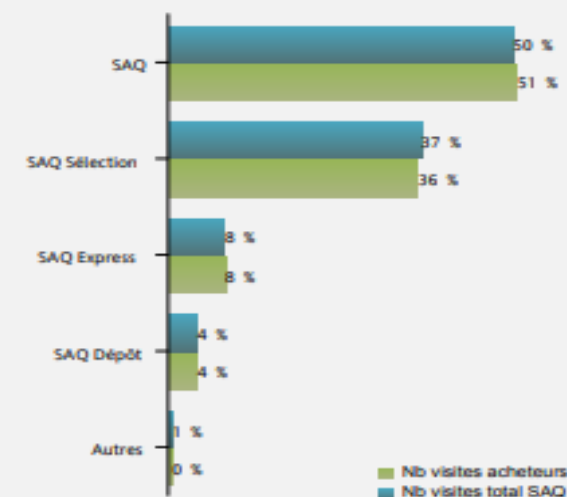


COMPORTEMENT DES VISITES

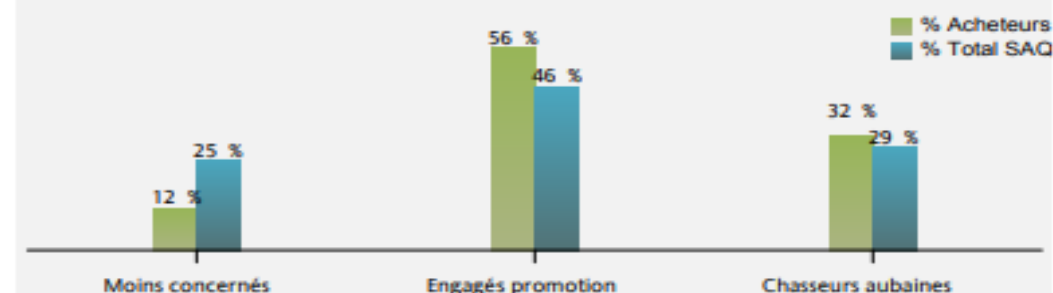
DISTRIBUTION DES JOURS (AVEC TRANSACTION)



DISTRIBUTION DES BANNIÈRES (AVEC TRANSACTION)



SEGMENTATION PROMOTION



Créé par l'équipe Intelligence d'affaires et connaissance client (IACC)
20 janvier 2020

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LE GOÛT DE PARTAGER

SAQ'S PROMOTIONNAL PACKAGES



SAQ

LE GOÛT DE PARTAGER

PARTNERSHIP PROMOTION

STAFF TRAINING

SOCIAL MEDIA

TARGETED CATEGORY
PROMOTION



du 2 au 8 juillet

Profitez de cette offre exclusive pour
faire le plein de vins de Californie.



WINDOW
DISPLAY

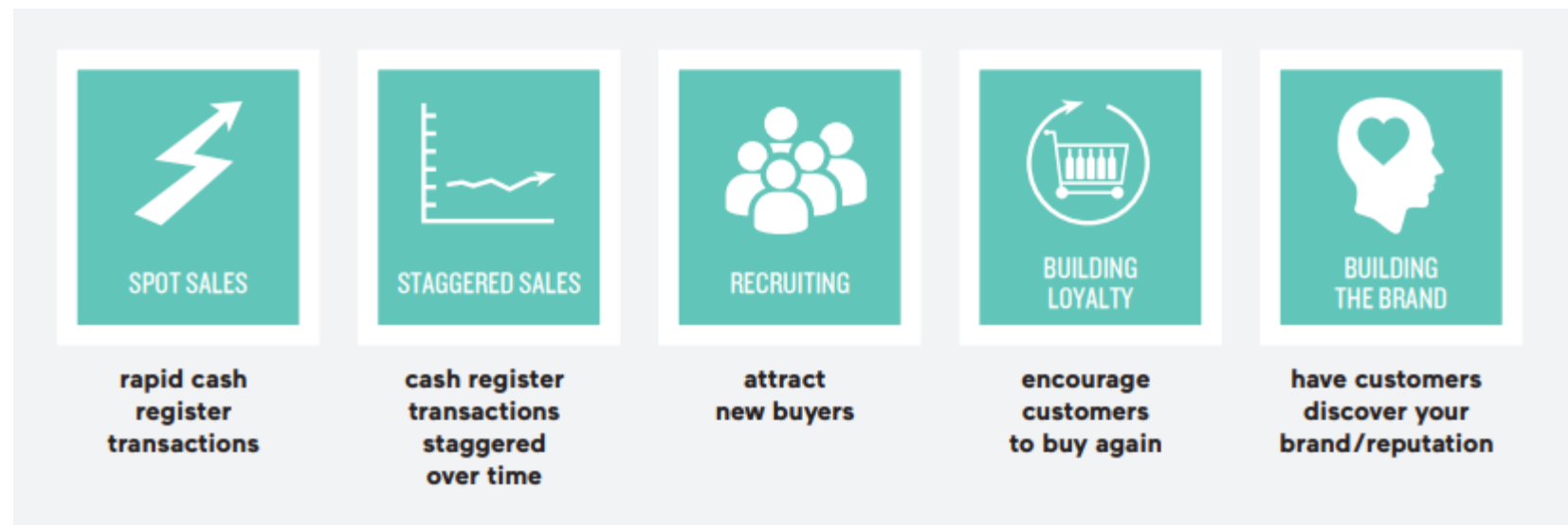


SAQ

LE GOÛT DE PARTAGER



PROMOTIONAL OPPORTUNITIES OVERVIEW



LE GOÛT DE PARTAGER

PROMOTING YOUR WINE

EXCLUSIVE OFFERS



TARGETED FLASH SALE



SAQ INSPIRE EVENT



LAUNCH OFFER PACKAGE



LE GOÛT DE PARTAGER

FLYER LTO
FLASH SALE
ONLINE SALES
DISPLAYS
SHELF EXTENDERS
REFRIGERATED SECTION
TASTINGS
WINDOW DISPLAY





targeted packages

exclusive offers on a product (psm)

For regular products (RA), continuous replenishment specialty products (SA), specialty by lot products (SL), and "Nursery program" products¹



BUILDING
LOYALTY



RECRUITING

BONUS
1,750
PTS

From September 5,
2019 to September
11, 2019



Château Des Estanilles 2016

Red wine
France, 750 ml \$18.20



take advantage

Conditions

exclusivement pour moi

Offres basées sur mon profil et mon historique d'achat.

BONI
1250
PTS

— déjà —
ACHETÉ



Pasqua Primitivo Lapaccio
Vin rouge
Italie, 750 ml

AROMATIQUE ET SOUPLE

du 31 mai au 6 juin

j'en profite

BONI
1000
PTS

— déjà —
ACHETÉ



J.M. Fonseca Albis
Vin blanc
Portugal, 750 ml

DÉLICAT ET LÉGER

du 31 mai au 6 juin

j'en profite



SAQ

LE GOÛT DE PARTAGER

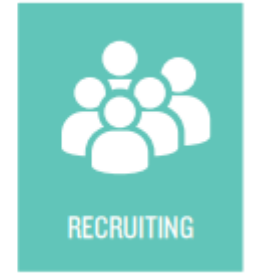




mass market packages

personalized store layout (displays)

For regular products (RA) and continuous replenishment specialty products (SA)



Mini display



Regular display

- ### Personalized
- store by store
 - product by product
 - by an algorithm
 - according to consumer needs



SAQ

LE GOÛT DE PARTAGER



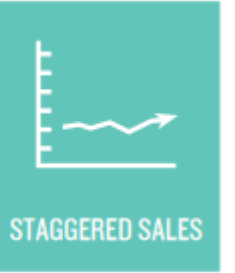
new product packages

launch offer package (“Nouveautés” section)

For regular products (RA) introduced over the past 12 months



RECRUITING



STAGGERED SALES



Visibility

- 3-4 consecutive periods
- Positionning in the « Nouveauté » wall
- 90 or 240 stores
- Tasting (Not available – COVID-19)



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LE GOÛT DE PARTAGER

SAQ COVID-19



SAQ

LE GOÛT DE PARTAGER

COVID – SAQ CUSTOMER TRENDS

34K

Inspire members
made their first
purchase on saq.com

+75%

Québec products sales

-2.1%

Share of sales in
« Celebration »
category

+3.2%

Share of sales in
Spirits category

Conversion rate

13,8 %

* Période de référence: P2 2020

**Better interest for
Customized offers**



AVERAGE # OF
TRANSACTIONS/
CLIENT

-11%

3,4



AVERAGE # OF
BOTTLES/CLIENT

+60%

18,7



AVERAGE
SPENDING/CLIENT

+58%

320,84 \$



AVERAGE # OF
STORES/CLIENT

-14%

1,6



% SL PRODUCTS
PURCHASES

-22%

9%

- Less transactions bigger basket
- Customers visit less stores and focus more on their proximity store
- Less specialty products purchased as people focus more on major brands and their safe bet
- Number of customers has tripled on SAQ.COM. Share of sales has increased **+220%** on SAQ.COM
- Increase in sales of low price products **+24%** (Red and White wines) and large format **+9%**

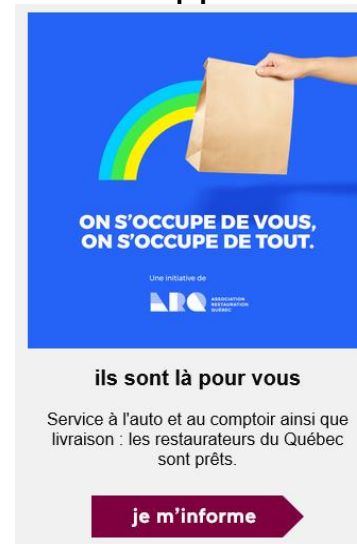
Time frame : January 24th to March 12th 2020 VS March 13th to April 30th 2020

LE GOÛT
DE PARTAGER



COVID - SAQ SOCIAL RESPONSIBILITY

ARQ
Support



94% Alcohol
donations to hospitals



50 000 \$
pour la Tablée des
Chefs

Support to all organisations
and canceled events



1. Video : 1 view = 1 meal to BAQ
2. Donation campaign at the register
3. Delivery fees of 12\$ donated to BAQ

COVID – SAQ RELAUNCH PLAN

Assortment Plan :

- 2020-2021 Assortment plan that was published in February is currently being revised
- Updated plan will be communicated on **July 16th**. Offer analysis to start on **September 8th**.
- Flexibility on the current submitted offers and expired ones due to the inactivity since March 15th.

Call for tenders:

- Rosés : publication on July 9th
- Coolers: publication in August



CALIFORNIA OPPORTUNITIES

	Developing category for which we want to improve the assortment.
	Balanced category whose product offers we are seeking to optimize.
	Fixed-quota category (only some exceptional offers may be selected).

RED WINE

Regular products	Seeking entry-level and mid-range products. Only certified organic products will be considered.
Specialty products	Seeking mid-range wines with high potential volume. Seeking natural-type wines. Advantage: easy-drinking, low-tannin, dry wines.

WHITE WINE

Regular products	Seeking entry-level and mid-range products. Only certified organic products will be considered Easy-drinking, dry wines only.
Specialty products	Seeking mid-range wines with high potential volume. Only certified organic products will be considered Seeking natural wines. Advantage: easy-drinking dry wines.

PRODUCTS CAN ALSO BE SUBMITTED FOR BIB CATEGORY, LOW PRICE, ROSÉ & SPARKLING WITHIN PUBLISHED NEEDS



LE GOÛT DE PARTAGER

DOING BUSINESS WITH SAQ

1 →

**PUBLISHING
ITS NEEDS**



2 →

**SUBMITTING
PRODUCT
OFFERS**



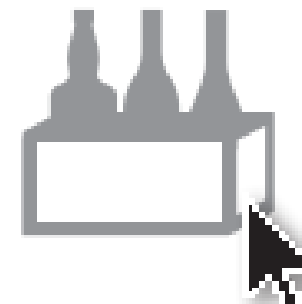
3 →

**SELECTING
PRODUCTS**



4 →

**PROCURING
PRODUCTS**



5 →

**DISTRIBUTING
PRODUCTS**



[HTTPS://MARKETING.GLOBALWINESPIRITS.COM/SAQ_B2B/PROCESSUS_SELECTION/ANG/PROCESSUS_SELECTION_COUVERT_ANG.PDF](https://marketing.globalwinespirits.com/saq_b2b/processus_selection/ang/processus_selection_couvert_ang.pdf)

THANKS



SAQ

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