

Report Brochure



## CANADA WINE MARKET LANDSCAPE

WINE CONSUMPTION BEHAVIOUR IN QUÉBEC AND ENGLISH-SPEAKING CANADA



FEBRUARY 2014



REPORT PRICE: • GBP 2,500 or 5 Report Credits

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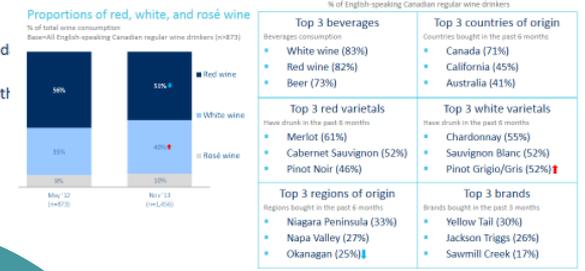
## Management summary Canadian wine market context

- Wine market classification: Canada is a “growth market” where the wine is becoming a mainstream product and experiencing growth
- Wine consumption: Globally, Canada ranks 12<sup>nd</sup> in volume for still light wine (43M 9l cases) of which 73% is imported. Volume sales witnessed growth of 3% since 2008.
- Per capita consumption of still light wine increased from 13.3 annum in 2008 to 14.52 litres per annum in 2012.
- Still light wine by country of origin
  - Italy, France and US were the largest exporters to Canada market share among the 3
  - US is the country that has shown the largest growth with 2011



## Management summary Meet English-speaking Canadian regular wine drinkers

English-speaking Canadian consumers are evenly distributed by gender and slight shift towards the 65+ age bracket (20% from 17% in '12)



Price also includes supporting data in Excel  
 (All Vinitrac® questions with cross-tabulations by gender, age groups and regions)

88 page PowerPoint report



# Excerpts from the introduction



“On the face of it, Canada is a logical, well-behaved wine market. The country boasts the world’s 11<sup>th</sup> largest economy; so fittingly it’s the 12<sup>th</sup> biggest market for wine. We can still classify Canada as a growth market – something we cannot say about the UK, or Australia.”

“But perhaps the most visible (and audible) characteristic that makes Canada defy homogeneity is its division into English and French-speaking groups. No study of the Canadian wine market makes any sense without taking this fact into account, as there are important cultural differences that inform wine choices and drinking behaviour on each side of the language divide.”

“This report includes detailed analysis of the 3.7 million Québécois wine drinkers, and those from the English-speaking areas of Canada, who number just over 11 million. With their differences and similarities.”

“It would be fair to say that Canada has escaped the worst effects of the global financial crisis, and is on a more stable economic footing than many Western countries. It’s possible to construct a reasonably positive forecast for the coming years, but there are going to be challenges for anyone exporting wine to the country.”

“Yet despite all of this, the growth continues. Canada has not yet reached the plateau that we’ve seen in Australia or the UK. For those that take the trouble to understand what binds Canadian wine drinkers together – and what divides them – there are likely to be more rewards to come.”



Graham Holter  
Associate Director –  
Publishing  
Wine Intelligence

February 2014



- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off premise)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International'  
They are defined as followed:
  - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
  - 'International': Category including wine brands that have wines from various countries
- The IWSR includes the following types of wine in its definition of 'wine':

### Definitions

**WINE =**

Still light wine +

Sparkling (Champagne & other) +

Fortified

} Sub-categories

### SAMPLE SIZES

At least 500 respondents per survey; 1,000 in most countries, 2,000 in US  
Regular adult wine drinkers (where 'regular' = drinks wine at least once per month)

Each Vinitrac® survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks wine at least once per month
- Drinks at least red, white or rosé wine
- Buys wine in the off-premise and/or in the on-premise channels

... and rejects all respondents who do not fulfil these Vinitrac® criteria



Each sample is representative of the 'regular' wine drinking population in that market and is therefore valid; a sample size of at least 500 consumers ensures results are reliable. It's like a 'smaller' version of the wine drinking population at large

### WHY IS VINITRAC® NOT A PANEL?

- Panels are good for monitoring detailed purchase activity but require regular input from exactly the same complete group of respondents
- This requires more time from respondents, for which they are paid, and panels are therefore more heavily skewed towards home-based consumers, e.g. students and home-makers
- This group of a country's wine-drinking population does not fully represent the accurate weighted sample of adult regular wine drinkers on which Vinitrac® insights are based

### HOW DOES VINITRAC® WORK?

- Invitations to participate in Vinitrac® are distributed to adult consumers in each market
- Consumers interested in a wine survey are directed to an URL address, which welcomes them to the online survey
- Wine Intelligence monitors incoming completed responses to build a sample representative of the wine drinking population of the target market
- When a representative sample of at least 1,000 (US: 2,000) is logged, the survey is closed



- The data for this study was collected in May 2012 and March & November 2013
- Data was gathered via Wine Intelligence's Vinitrac<sup>®</sup> online survey:
  - 1,190 Canadian regular wine drinkers in 2012
  - 2,002 Canadian regular wine drinkers in 2013
- Respondents were screened to ensure that they drink wine at least once per month; drink red, white or rosé wine; and buy wine in the off-trade and/or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The 2012 and 2013 data are representative of Canadian regular wine drinkers in terms of age and gender

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