



Canada Portraits 2011

Segmenting and analysing Canadian wine consumers



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Portraits is a segmentation of Canadian regular wine drinkers. It groups regular wine drinkers together based on their attitude towards, and relationship with wine. It provides wine businesses with a reference segmentation which can be applied to individual brands, regions, countries of origin, style categories and retailers.

What is the scope of Portraits?

- Canada Portraits is based on a sample of more than 4,000 regular wine consumers – that is, those who drink wine at least once per month (a full description of the sample is included in the appendix).
- We routinely conduct online surveys in this market. Our sample is fully representative of Canada's 14.5 million regular still light wine consumers, and is based upon our annual calibration studies.
- In addition to the online survey, focus groups and in-depth interviews were conducted with the most valuable Portrait groups.
- In addition, a qualitative research program was conducted, most recently in April 2010. Using face-to-face focus groups with consumers from the key segments, an additional in-depth understanding of the motivations and behaviours driving wine consumption was explored.





Market overview

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Overview of the Canadian wine market: 14.5 million regular wine drinkers



27.4 million adults in Canada*

53% of Canadian adults are regular still light wine drinkers
(i.e. drink wine at least once per month)

59% of Quebec adults are regular
still light wine drinkers

51% of English-speaking adults
are regular still light wine
drinkers

14.5 million regular wine drinkers

60% of regular wine drinkers in Canada,
drink wine weekly or more

8.7 million regular wine drinkers in
Canada drink wine weekly or more

40% of regular wine drinkers in Canada,
drink wine 1-3 times/month

5.8 million regular wine drinkers in
Canada drink wine 1-3 times a month



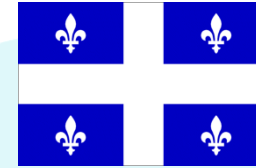
What are the main differences and similarities between English-speaking Canada and Quebec?



Higher penetration for drinking **Canadian** wine

More likely to drink from other **New World** wine producing countries

More likely to consider wine to be reasonably priced



Prefer Old World wines, particularly **French**

Stronger bias towards **red wine** (68% of wine consumed is red, vs. 58% for Canada as a whole)

More involved and experimental with wine

More influenced by recommendations from a variety of sources



- The data for this study was collected in two surveys between March and October 2010
- Data was gathered via Wine Intelligence's Vinitrac® online surveys with 4,050 Canadian regular wine drinkers
- Sampling strategy: quotas (age, gender, province)
- Screening criteria: legal drinking age, drink wine at least once per month, drink red, white or rosé wine
- The distribution of the sample is listed in the table to the right

Canadian regular wine drinkers

Gender	Male	49%
	Female	51%
Age	LDA - 24	10%
	25 - 34	15%
	35 - 44	19%
	45 - 54	20%
	55 - 64	16%
	65 and over	21%
Canada provinces	Ontario	38%
	British Columbia	16%
	Alberta	8%
	Other Provinces	10%
	Quebec	27%



Involvement scale

The Wine Intelligence involvement scale is the result of calculating one score per respondent based on the answers they give to four measures:

- “I like to take my time when I purchase a bottle of wine”
- “Wine is something important in my lifestyle”
- “Drinking wine gives me pleasure”
- “I have a strong interest in wine”

Scales have been drawn from Laurent and Kapferer, 1985, Mittal and Lee, 1989, Lockshin *et alii*, 1997

Average number of wine drinking occasions per month

We have estimated the average number of times respondents drink wine in a month for each occasion:

- If “Less than once a month”, then value = 0.5
- If “1-3 times per month”, then value = 2
- If “About once a week”, then value = 4
- If “2-5 times per week”, then value = 14
- If “Everyday / most days”, then value = 25



- We have calculated a mean spend per bottle for each occasion in the off-trade:
 - If “Less than \$6”, then value = 5.5
 - If “Between \$6 and \$7.99”, then value = 7
 - If “Between \$8 and \$9.99”, then value = 9
 - If “Between \$10 and \$12.99”, then value = 11.5
 - If “Between \$13 and \$15.99”, then value = 14.5
 - If “\$16 or more”, then value = 17.5
 - If “I don’t drink wine on this type of occasion”, then value = 0

- ...and a mean spend per bottle for each occasion in the on-trade:
 - If “Less than \$10”, then value = 9.5
 - If “Between \$10 and \$14.99”, then value = 12.5
 - If “Between \$15 and \$19.99”, then value = 17.5
 - If “Between \$20 and \$24.99”, then value = 22.5
 - If “Between \$25 and \$29.99”, then value = 27.5
 - If “Between \$30 and \$39.99”, then value = 35
 - If “Between \$40 and \$49.99”, then value = 45
 - If “\$50 or more”, then value = 52.5
 - If “I don’t drink wine on this type of occasion”, then value = 0

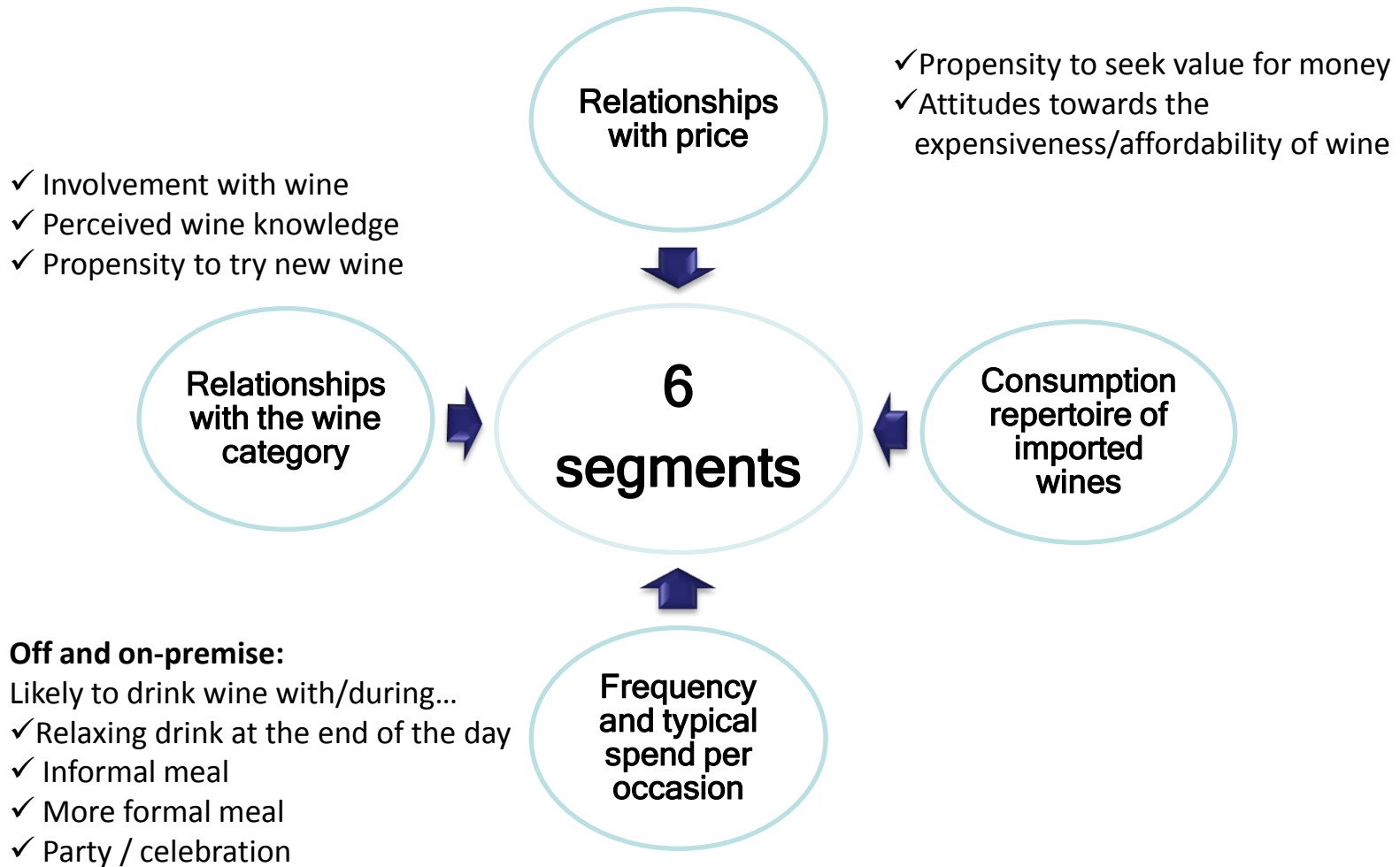


- We have calculated share of spend as follows:
 - We have calculated an average spend per month for each occasion:
 - Average spend for named occasion x Average drinking frequency for named occasion
 - We have then calculated the sum for all occasion (e.g. total spend) per individual
 - Share of spend = (spend per individual for named occasion x segment size) / (total spend for all segments)



Clustering inputs:

Age, gender, relationships with wine and wine buying behaviour



The most recent set of qualitative data was gathered in April 2010

3 focus groups were conducted with the four Portrait groups with the highest level of involvement with wine:

- **Adventurous Treaters and Risk-averse Youngsters**
- **Experienced Boomers**
- **Premium Brand Suburbans**

Duration: 1.5hrs per group

Locations: Ontario and British Columbia



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