
CANADA LANDSCAPES

FEBRUARY 2019 Report

A circular logo with a light blue background. The word "wine" is written in a lowercase, white, sans-serif font with a dot over the 'i'. Below it, the word "intelligence" is written in a smaller, lowercase, white, sans-serif font.

wine
intelligence



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Canada Landscapes 2019 report

Report Overview



Report price:

GBP 2,500
USD 3,300
AUD 4,700
EUR 2,900

5
report
credits

The Canada Landscapes 2019 report includes:

- Report with the latest information regarding the Canada wine market, supported by:
 - Wine Intelligence Vinitrac® Canada
 - Wine Intelligence market experience
 - Secondary sources
 - Trade interviews
- User-friendly data table with all the measures from Vinitrac® showing significances, cross tabbed with:
 - All Canadian regular wine drinkers in 2019
 - Gender groups
 - Age groups and Portraits groups
 - Canadian Provinces
 - Wine involvement
- Tracking data 2014-2017-2018

The Canadian wine market, as detailed in this latest Landscape report, is notable just as much for the trends that are expected as trends that are actually happening. Some of the trends noted last year, such as the emerging market for everyday sparkling wine and the anticipated growth of rosé, are indeed coming to fruition. Rosé was tipped for growth last year, and the evidence from this year's data suggests that it has grown its consumer base, especially among younger (under 35), female and highly-involved Canadian monthly wine drinkers. Evidence points to a strong boost in premium rosé, principally from the Provence region of France, and the fact that the key Liquor Control Boards are stocking more rosés year-round.

Sparkling wine, as with other major consumption markets around the world, is riding a boom of everyday celebration, led by Prosecco, fast becoming Italy's most high-profile wine export. Volumes remain modest compared with still wine – around 30 bottles of still wine are purchased in Canada for every one of sparkling – but growth rates are spectacular. Volumes of Prosecco have almost doubled in five years, and the category as a whole has advanced by 40% in volume terms.

Locally-produced wines have also been making solid progress for the past decade, as better growing and winemaking practices in both the key wine producing regions of Okanagan (BC) and Niagara (Ontario) have enabled a whole generation of (mainly English-speaking) wine drinkers to tune into a high-quality domestic product. The news this year is that drinkers in French-speaking Québec, who previously had little access to, or interest in, locally-made wines, are becoming more attuned to the category, abetted by strong support from the liquor control board.

So, of the anticipated trends for the Canadian wine market, which are not evident so far? The elephant in the room on any discussion of Canadian drinking habits is the recent decriminalisation of Cannabis, and the establishment of state-controlled retail outlets for the drug. So far, at least, the reality on the ground is not as exciting as the speculation. From the limited evidence we have so far, there hasn't been any dramatic shift in behaviour. This may change, as the 'edibles' sector of Cannabis product gets regulatory clearance and starts trading.

In a similar vein, the slow, partial liberalization of licensing laws in Ontario, the richest and most populous Province, has yet to translate into wholesale changes of shopping behaviour. The long-run trends in the country as a whole show a drift away from state-controlled liquor retail and towards privatized liquor stores. However, this has more to do regulatory changes that the British Columbia and Alberta markets made some time ago, which are only now filtering through into Canadian wine consumers' habits.



Lulie Halstead Chief
Executive
Wine Intelligence

1. Although the market remains in growth, volume growth has slowed, while value has increased
2. Rosé wine consumption is increasing, especially in Québec
3. Consumption of sparkling wine is booming, albeit from a low base
4. Consumption among wine drinkers of beer and craft beer has increased
5. The proportion of Canadians consuming local wines is growing, mainly driven by Québécois regular wine drinkers
6. French regions are losing consumer mind space in Québec

- The data for this survey was collected in Canada in October 2014, October 2017 and October 2018
- Data was gathered via Wine Intelligence’s Vinitrac® online survey:
 - 1,002 Canadian regular wine drinkers (October 2014)
 - 1,000 Canadian regular wine drinkers (October 2017)
 - 1,000 Canadian regular wine drinkers (October 2018)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-premise or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of Canadian regular wine drinkers in terms of gender, age and Canada Provinces
- The distribution of the sample is:

		Canada		
		2014 1,002	2017 1,000	2018 1,000
Gender	Male	50%	50%	50%
	Female	50%	50%	50%
	TOTAL	100%	100%	100%
Age 6 groups	19-24	9%	9%	9%
	25-34	19%	20%	20%
	35-44	16%	22%	22%
	45-54	19%	13%	13%
	55-64	18%	18%	18%
	65+	19%	18%	18%
	TOTAL	100%	100%	100%
Canada Provinces	Québec	26%	25%	25%
	Ontario	40%	39%	39%
	West	28%	30%	30%
	Other Provinces	6%	5%	5%
	TOTAL	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Canada, October 2014 (n=1,002), October 2017 (n=1,000) and October 2018 (n=1,000) Canadian regular wine drinkers



Trade interview methodology

- Five trade interviews were conducted with experienced industry professionals in the Canadian wine trade in February 2019
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The interviewees were members of the wine trade working as:
 - *1x Wine Educator*
 - *1x Marketer*
 - *1x Wine Director*
 - *1x Wine Specialist*
 - *1x Wine Importer*

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

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