

WINE INTELLIGENCE

# Sparkling Wine in the Canadian Market

JULY 2019

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# Sparkling Wine in the Canadian Market 2019 Report



Insights to help your business flourish

The Sparkling Wine in the Canadian Market 2019 report includes:



Our team is always available in case you need guidance on how to use our data tables

	All drinkers of sparkling wine in Canada		
	Sample size	2000	405
<b>Attitudes towards sparkling wine</b>			
Which has influenced you of the following statements to be applicable to them			
Base - All Canadian drinkers of sparkling wine (n=1900)			
I enjoy trying new and different styles of sparkling wine on a regular basis	40%	39%	42%
I don't mind what sparkling wine I buy so long as the price is right	23%	27%	23%
I know what sparkling wine I like and I tend to stick to what I know	35%	34%	34%
<b>Sparkling wine involvement, value and expertise</b>			
To which have influenced the following statements to be applicable to them			
Base - All Canadian drinkers of sparkling wine (n=1900)			
Drinking sparkling wine gives me pleasure	72%	66%	75%
I always look for the best quality sparkling wines I can get for my budget	65%	59%	71%
I like to take my time when I purchase a bottle of sparkling wine	60%	50%	63%
Deciding which sparkling wine to buy is an important decision	49%	48%	50%
I have a strong interest in sparkling wine	38%	34%	41%
Generally speaking, sparkling wine is an expensive drink	27%	40%	34%
I feel competent about my knowledge of sparkling wine	32%	36%	28%
Sparkling wine is important to me in my lifestyle	30%	28%	33%
<b>Section 6 - How People View Sparkling Product Concepts</b>			
<b>Sparkling wine product styles</b>			
To who would consider purchasing the following sparkling wine products			
Base - All Canadian drinkers of sparkling wine (n=1900)			
in a single serve can			
Would definitely not consider buying	16%	20%	16%
Would not consider buying	22%	25%	18%
I don't have a view either way	23%	23%	23%
Would consider buying	28%	26%	30%

- Report with the latest information regarding the sparkling wine market in Canada, supported by:
  - Wine Intelligence Vinitrac® Canada
  - Wine Intelligence market experience
  - Secondary sources

- User-friendly data table with all the measures from Vinitrac® Canada showing significances, cross tabbed with:
  - Gender groups
  - Age groups
  - Household income
  - Provinces
  - Language
  - Sparkling wine types
  - Attitudes
- Tracking data 2017-2018-2019



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- The data for this study was collected in March 2017, May 2018 and May 2019
- Data was gathered via Wine Intelligence’s Vinitrac® online survey of all alcohol drinkers and sparkling wine drinkers in Canada:
  - 1,011 drinkers of sparkling wine in **Canada who have ever drunk sparkling wine before in March 2017**
  - 1,000 drinkers of sparkling wine in Canada **who drink sparkling wine at least once a year in May 2018**
  - 1,000 drinkers of sparkling wine in Canada **who drink sparkling wine at least once a year in May 2019**
- Respondents meet the following requirements:
  - Adult drinking age
  - Permanent resident of the country
  - Are aware of at least one sparkling wine type\*
  - Drink at least one type of sparkling wine at least once a year\*
- For the purpose of tracking, a subset of sparkling wine drinkers who have drunk sparkling at least once a year (n=912) **in 2017 data** have been used
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of Canadian alcohol drinkers and sparkling wine drinkers in terms of age and gender

		Canada		
		2017	2018	2019
		<i>sample size</i>	<i>1,000</i>	<i>1,000</i>
Gender	Male	49%	46%	46%
	Female	52%	54%	54%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Age	19-24	13%	11%	11%
	25-34	22%	23%	23%
	35-44	17%	23%	23%
	45-54	15%	15%	15%
	55-64	14%	13%	13%
	65 and over	19%	15%	15%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Region	Québec	23%	25%	24%
	Ontario	41%	41%	40%
	West	31%	30%	30%
	Other provinces	5%	5%	5%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Wine Intelligence, Vinitrac® Canada, March '17 n=912, May 2018 n=1,000 and May 2019 n=1,000 drinkers of sparkling wine in Canada who drink sparkling wine at least once a year



- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off trade)
- 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 +

Light aperitifs (vermouth...) +

Other (rice wines...)

} Sub-categories





### Trade interview methodology

- Trade interviews were conducted with five experienced industry professionals in Canada's 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 five interviewees were members of the wine trade working in different roles within the industry:
  - *x 1 Wine Educator*
  - *x 1 Wine Promoter*
  - *x 1 Wine Director*
  - *x 1 Wine Importer*
  - *x 1 Wine Specialist*



## How does Vinitrac<sup>®</sup> 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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