



WINE INTELLIGENCE

CANADA PROVINCE-LEVEL WINE LANDSCAPES 2020

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- Wine Intelligence Ltd: 109 Maltings Place, 169 Tower Bridge Road, London SE1 3LJ Tel: 020 73781277. E-mail: info@wineintelligence.com. Registered in England as a limited company number: 4375306

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HOW TO READ THIS REPORT

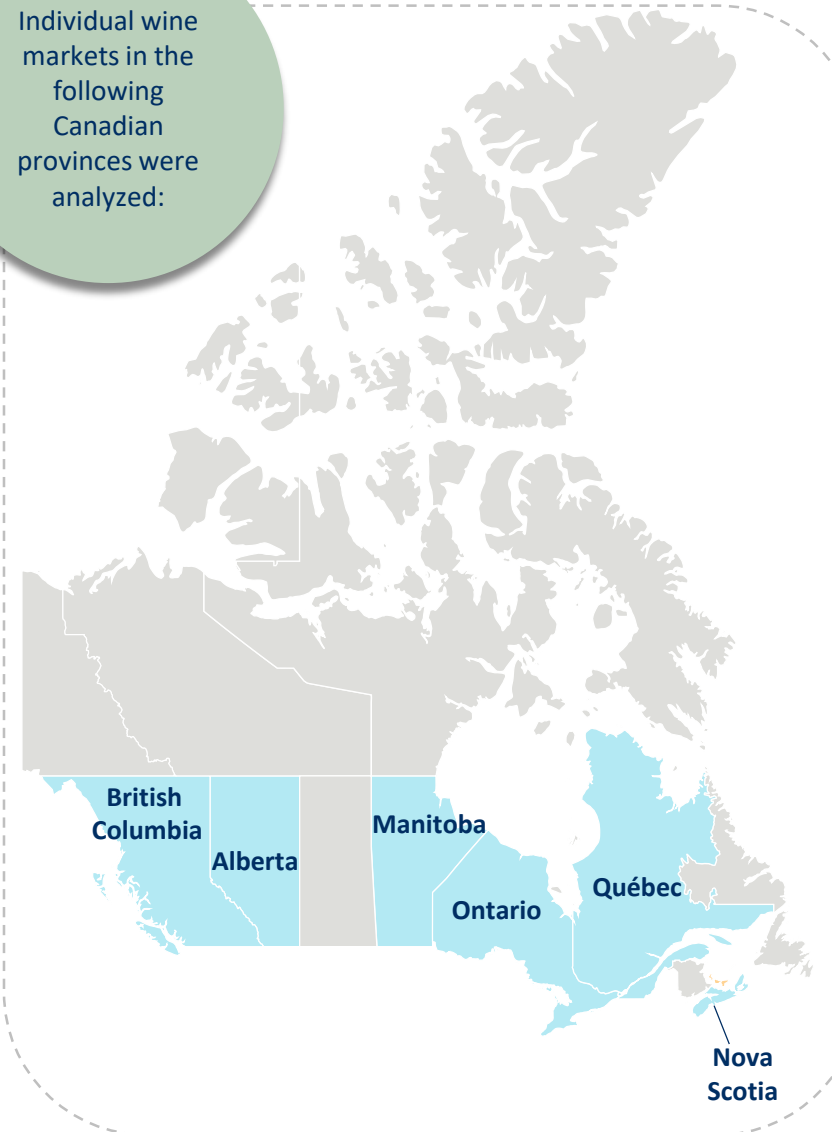


- This 102-page report covers a wide variety of topics regarding the Canadian wine market. Drawing on previous and new consumer data, the report provides a detailed analysis of how the wine markets in six Canadian provinces are performing.
- The report begins with **key differences between the six analyzed provinces**, followed by a **detailed analysis of consumer wine drinking habits, consumption and retail trends within each province**.
- The six provinces were selected because the number of interviews collected using Wine Intelligence's Vinitrac online consumer survey was sufficient to be able to conduct a statistically valid analysis by individual provinces.
- Canada Province-level Landscapes 2019 also includes **tracking against 2015 and 2017** to better understand how Canadian regular wine drinkers have, or have not, changed over the years. Tracking differences are coded as follows:

↑ : statistically significantly **higher** than previous wave(s) at a 95% confidence level
↓ : statistically significantly **lower** than previous wave(s) at a 95% confidence level

- Unless otherwise stated, **all tracking arrows included in this report refer to data collected in 2015**. Due to methodology changes, **tracking data about the Canada Portraits segmentation, knowledge and confidence indexes, and off- / on-premise frequency and spend are all tracked against 2017**

Individual wine markets in the following Canadian provinces were analyzed:



Research methodology

Vinitrac®



- The data for this report was collected in Canada in March & October 2015, March, April, July & October 2017 and January, March, May, July & October 2019
- Data was gathered via Wine Intelligence’s Vinitrac® online survey:
 - 2,001 Canadian regular wine drinkers (2015)
 - 5,326 Canadian regular wine drinkers (2017)
 - 7,482 Canadian regular wine drinkers (2019)
- 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 shown in the table

		2015	2017	2019	
		<i>n=</i>	<i>2,001</i>	<i>5,326</i>	<i>7,482</i>
Gender	Male	50%	52%	50%	
	Female	50%	48%	50%	
	Total	100%	100%	100%	
Age	19-24	8%	11%	9%	
	25-34	18%	18%	20%	
	35-44	16%	18%	22%	
	45-54	20%	17%	13%	
	55-64	18%	18%	18%	
	65 and over	20%	18%	18%	
	Total	100%	100%	100%	
Provinces	Ontario	40%	39%	38%	
	British Columbia	16%	12%	13%	
	Alberta	7%	9%	11%	
	Québec	27%	28%	26%	
	Manitoba	3%	5%	4%	
	Nova Scotia	2%	2%	2%	
	Other provinces	5%	5%	6%	
	Total	100%	100%	100%	

Source: Wine Intelligence, Vinitrac® Canada, 2015 (n=2,001), 2017 (n=5,326), 2019 (n=7,482) Canadian regular wine drinkers

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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Wine Intelligence London (Head Office)

109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ

Telephone: +44 (0)20 7378 1277

Email: info@wineintelligence.com

Website: www.wineintelligence.com

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