



WINE INTELLIGENCE

# SPARKLING WINE IN THE CANADIAN MARKET

July 2020

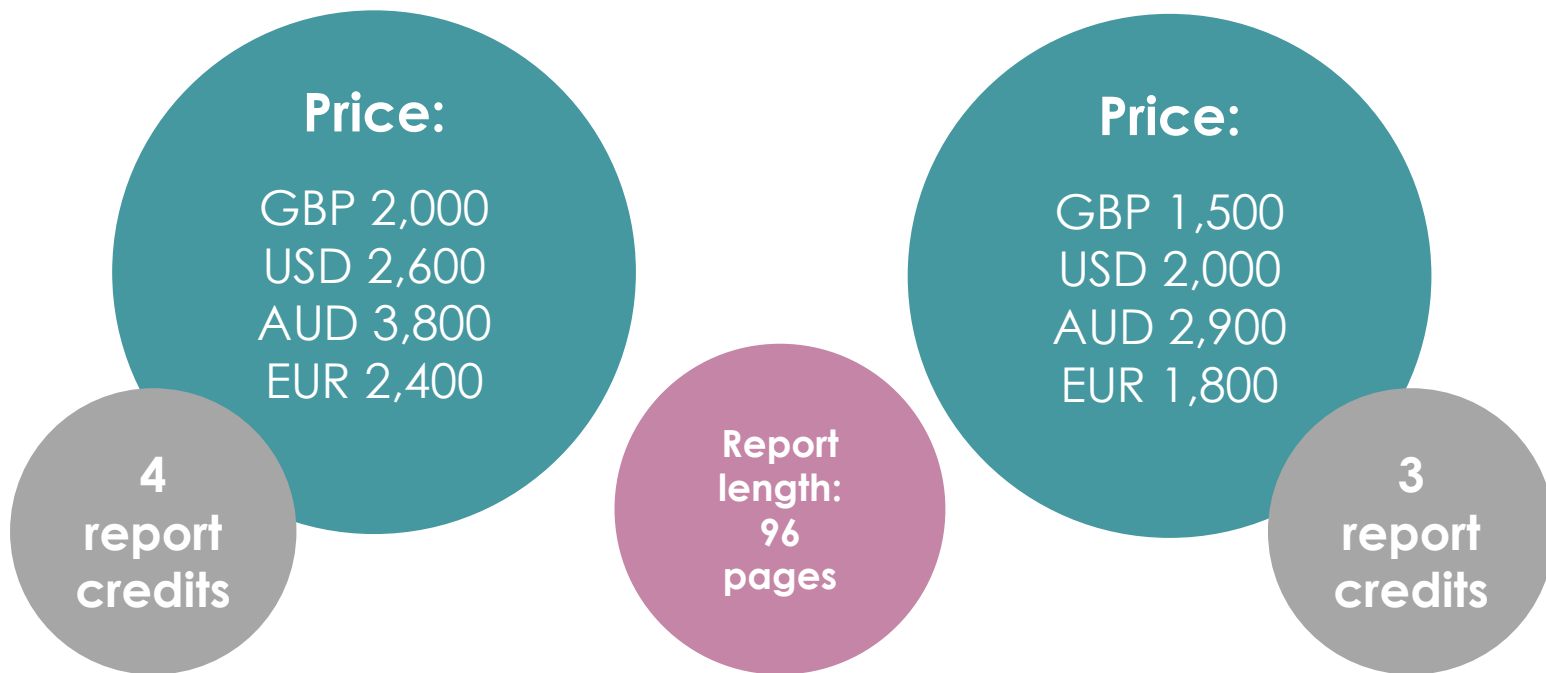
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# INTRODUCTION



A number of commentators have likened the past few months of coronavirus lockdowns to a series of gigantic, multinational social experiments, with some fascinating – but often unsurprising – results. People scared to go to work by public transport? Bicycle sales, which were already growing in many markets grow faster. Millions of people confined to their homes? Guitar sales, growing globally at around 3%, suddenly see a big jump. And what happens if you stop people from going to bars and attending big social events? Shorn of the need to show off, and perhaps disinclined to spend money, consumers appear to be opting for lower cost sparkling wine options.

In Canada, this means a boost for the Prosecco and domestic sparkling categories, and also an increase in everyday drinking. Sparkling wine drinkers in Canada anticipate consuming more sparkling wine post the current impacts of the Covid pandemic, especially domestic Canadian sparkling wine.

Canada has experienced a long-term increase in the volume of sparkling wine consumed, though from a relatively small base – it ranking 37<sup>th</sup> in the world in terms of per capita consumption of sparkling wine. Historically, the Canadian sparkling wine market has been dominated by imports, and this continues to be the case, led by Prosecco. However, in a market where currently just 18% of the share of sparkling wine is Canadian in origin, the growth of this domestic sparkling wine remains strong. In line with evidence seen across many sparkling wine markets globally, there was a reduction in sparkling wine purchase during the ‘lockdown’ period of March to June 2020, and this was particularly true for imported sparkling wine and most notably Champagne.

As consumers tend towards a higher trust levels in ‘local’ during times of both economic and social unease, consumers here shifted towards ‘local’ products during this period.

Canadian drinkers of sparkling wine are also becoming less experimental and adventurous with their choices of sparkling wine, particularly amongst older male drinkers, who increasingly stick to the sparkling wine they know. The evidence here suggests the category is becoming a more everyday and mainstream choice, rather than reserved solely for special occasions. Canadian consumers appear to be becoming more involved and confident in their knowledge of sparkling wine, led by female Millennials in particular, suggesting that they feel more comfortable with sparkling wine as an everyday choice.

Which brings us back to the pandemic and the impact it is having on sparkling wine’s popularity in Canada. The evidence presented in this report shows that a growing proportion of Canadian consumers would now consider drinking sparkling wine for informal occasions at home, departing from the association with sparkling wine as a ‘special’ occasion choice. Larger scale celebrations and events, and particularly those held in on-premise settings, are not a future priority for drinkers of sparkling wine in Canada, who state they will focus more on saving money, local vacations and investing in education in the next 12-18 months. Instead they say they will be focused more on social events in the home going forward – potentially adding fuel to the ‘everyday sparkling’ occasion trend.

# RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Canada in March 2017, May 2018, May 2019 and June 2020

Data was gathered via Wine Intelligence’s Vinitrac® online survey

Respondents were screened to ensure they:

- 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 distribution of the sample is shown in the table

|                 |                 | <i>Mar-17</i> | <i>May-18</i> | <i>May-19</i> | <i>Jun-20</i> |
|-----------------|-----------------|---------------|---------------|---------------|---------------|
|                 |                 | <i>n= 912</i> | <i>1,000</i>  | <i>1,000</i>  | <i>1,000</i>  |
| <b>Gender</b>   | Male            | 49%           | 46%           | 46%           | 47%           |
|                 | Female          | 52%           | 54%           | 54%           | 53%           |
|                 | <b>Total</b>    | <b>100%</b>   | <b>100%</b>   | <b>100%</b>   | <b>100%</b>   |
| <b>Age</b>      | 19-24           | 13%           | 11%           | 11%           | 9%            |
|                 | 25-34           | 22%           | 23%           | 23%           | 23%           |
|                 | 35-44           | 17%           | 23%           | 23%           | 19%           |
|                 | 45-54           | 15%           | 15%           | 15%           | 15%           |
|                 | 55-64           | 14%           | 13%           | 13%           | 15%           |
|                 | 65 and over     | 19%           | 15%           | 15%           | 18%           |
|                 | <b>Total</b>    | <b>100%</b>   | <b>100%</b>   | <b>100%</b>   | <b>100%</b>   |
| <b>Province</b> | Québec          | 23%           | 25%           | 24%           | 27%           |
|                 | Ontario         | 41%           | 41%           | 40%           | 37%           |
|                 | West            | 31%           | 30%           | 30%           | 31%           |
|                 | Other Provinces | 5%            | 5%            | 5%            | 6%            |
|                 | <b>Total</b>    | <b>100%</b>   | <b>100%</b>   | <b>100%</b>   | <b>100%</b>   |

Wine Intelligence, Vinitrac® Canada, March 2017 (n=912), May 2018 (n=1,000), May 2019 (n=1,000) and June 2020 (n=1,000), Canadian drinkers of sparkling wine who drink sparkling wine at least once a year

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