



WINE INTELLIGENCE

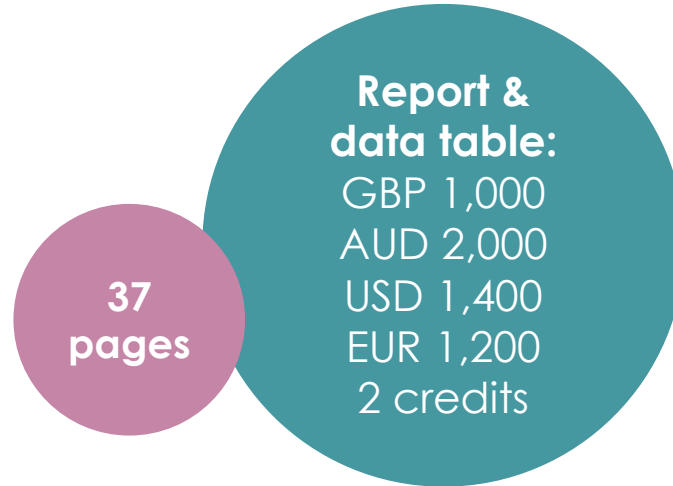
OPPORTUNITIES FOR LOW- AND NO-ALCOHOL WINE IN THE CANADIAN MARKET

APRIL 2021

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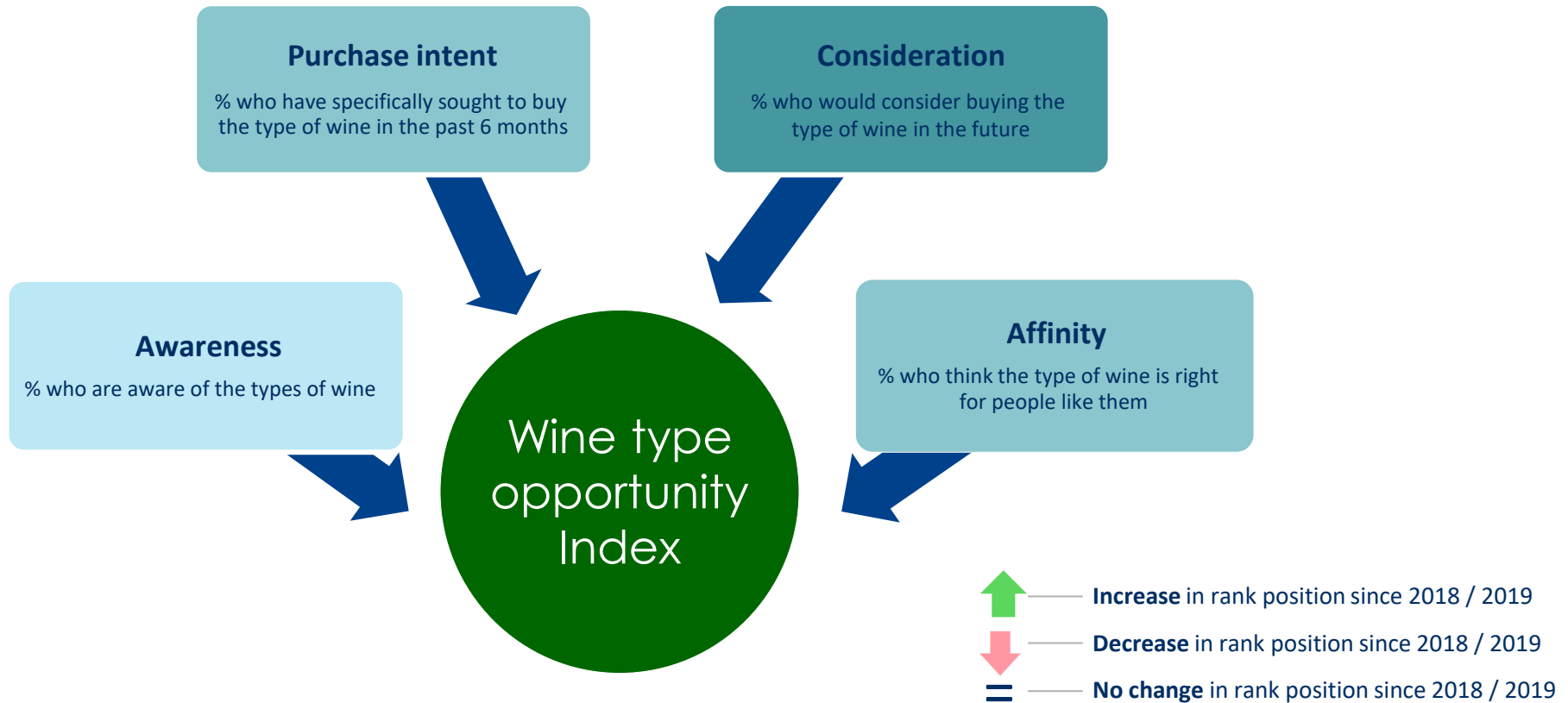


CONTEXT: WINE TYPE OPPORTUNITY INDEX



Using four measures (awareness, intent to purchase, purchase consideration and affinity) this index shows the strength of opportunity for alternative wine types

- The index is **weighted to reflect the size of the wine drinking population** in each market, enabling the wine opportunity index to be **reflective of the global market opportunity**



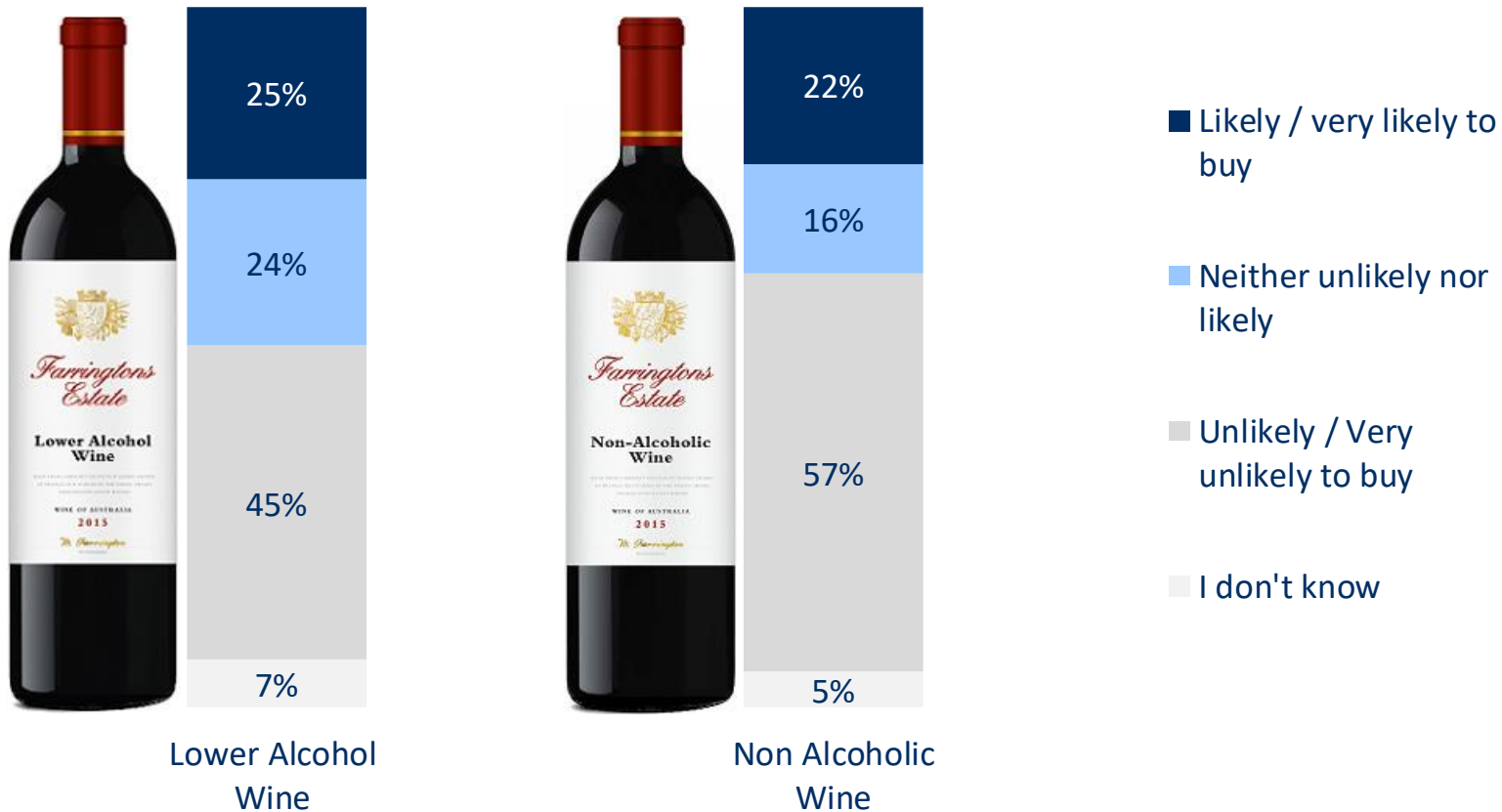
EXAMPLE SLIDE: PURCHASE INTENT: BASED ON CLAIMS ON WINE LABELS



A quarter of Canadian regular wine drinkers would be likely to purchase lower alcohol wine, whilst more than half are unlikely to purchase non-alcoholic wine

Intent to purchase

% who would be likely or very likely to buy each wine
Base = All Canadian regular wine drinkers (n=1,013)



EXAMPLE SLIDE: PURCHASE INTENT OF WINE TYPES



As with the US, high involvement is the pre-requisite for wanting to buy alternative wines; within this universe, under-55s are significantly more likely to be customers

Intent to purchase: By gender, age and involvement

% who would be likely or very likely to purchase the following wines

Base = All Canadian regular wine drinkers (n=1,013)

	All Canadian regular wine drinkers	Gender		Age			Wine Involvement		
		Male	Female	19-34	35-54	55+	Low	Medium	High
<i>n=</i>	1,013	512	501	292	350	372	247	425	340
Award Winning	44%	43%	44%	46%	46%	40%	23%	44%	58%
Natural Wine	41%	42%	41%	53%	38%	34%	26%	44%	48%
Environmentally Friendly	40%	38%	43%	45%	45%	31%	30%	38%	49%
Sulphite Free Wine	39%	38%	40%	41%	43%	34%	22%	38%	53%
Organic	39%	38%	40%	45%	48%	27%	26%	42%	47%
Sustainably Produced	38%	41%	36%	41%	43%	31%	29%	36%	47%
Established 1870	38%	36%	40%	49%	39%	28%	24%	34%	52%
Preservative Free	37%	33%	40%	40%	42%	29%	21%	37%	46%
Fairtrade	34%	31%	38%	38%	37%	29%	23%	30%	49%
Carbon Neutral	29%	27%	31%	35%	34%	18%	20%	25%	40%
Lower Alcohol Wine	25%	23%	26%	29%	33%	14%	16%	22%	34%
Biodynamic Wine	23%	24%	21%	33%	22%	15%	14%	20%	34%
Non Alcoholic Wine	22%	22%	23%	33%	26%	11%	16%	22%	27%
Vegan Wine	22%	20%	23%	31%	28%	9%	11%	22%	30%
Vegetarian Wine	19%	19%	20%	28%	22%	10%	9%	16%	31%

Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Canada, October 2020 (n=1,013), Canadian regular wine drinkers

EXAMPLE SLIDE: LOWER-ALCOHOL WINE PURCHASE MOTIVATION



The main reason for consumers to choose lower alcohol wine is linked with personal health, followed by a positive taste experience

Lower Alcohol wine Purchase Motivation: by gender, age and involvement

% who selected the following statements as motivations to buy lower alcohol wines

Base = Those who have sought to buy lower alcohol wine in the past 6 months or would consider buying it in the future

	All Canadian regular wine drinkers	Gender		Age			Wine Involvement		
		Male	Female	19-34	35-54	55+	Low	Medium	High
It's better for my health	53%	46%	61%	51%	58%	50%	48%	66%	42%
I enjoy the taste	45%	51%	39%	40%	53%	41%	31%	54%	42%
Less calories than other wines	38%	36%	40%	41%	36%	37%	37%	45%	30%
I like to stay in control	33%	29%	37%	28%	38%	31%	22%	42%	29%
Price is lower than standard wine	29%	30%	27%	35%	31%	19%	18%	38%	24%
It gives me fewer headaches	28%	26%	30%	32%	32%	18%	27%	35%	20%
It goes better with food	27%	38%	16%	34%	31%	12%	20%	27%	30%
I'm on a diet	23%	22%	23%	34%	23%	10%	28%	22%	20%
I will be driving	19%	23%	16%	24%	18%	16%	4%	27%	18%
Most of my friends are drinking it	13%	18%	9%	19%	11%	10%	4%	18%	13%
I like to be seen drinking it	7%	12%	2%	13%	7%	0%	0%	7%	11%
I would not consider drinking lower alcohol wines	1%	2%	0%	0%	0%	3%	0%	0%	2%
Other	1%	0%	2%	0%	2%	0%	0%	2%	0%
None of these / no opinion	5%	7%	4%	8%	2%	6%	5%	4%	7%

CANADA RESEARCH METHODOLOGY: QUANTITATIVE



- The data was collected in the Canada in October 2020
- March 2019 was tracked against October 2020
- Data was gathered via Wine Intelligence’s Vinitrac® online survey
- Respondents were screened to ensure that they were at least 19 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-trade or in the on-trade
- 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, Province
- The distribution of the sample is shown in the table:

		<i>Mar-19</i>	<i>Oct-19</i>
		<i>n= 1,000</i>	<i>1,013</i>
Gender	Male	50%	51%
	Female	50%	49%
	Total	100%	100%
Age	19-24	9%	7%
	25-34	20%	22%
	35-44	22%	18%
	45-54	13%	17%
	55-64	18%	17%
	65 and over	18%	20%
	Total	100%	100%
Province	Quebec	28%	25%
	Ontario	36%	38%
	West	30%	31%
	Other Provinces	6%	5%
	Total	100%	100%

Source: Wine Intelligence, Vinitrac® Canada, March 2019 (n=1,000) and October 2020 (n=1,013) Canadian regular wine drinkers

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