WINE INTELLIGENCE

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

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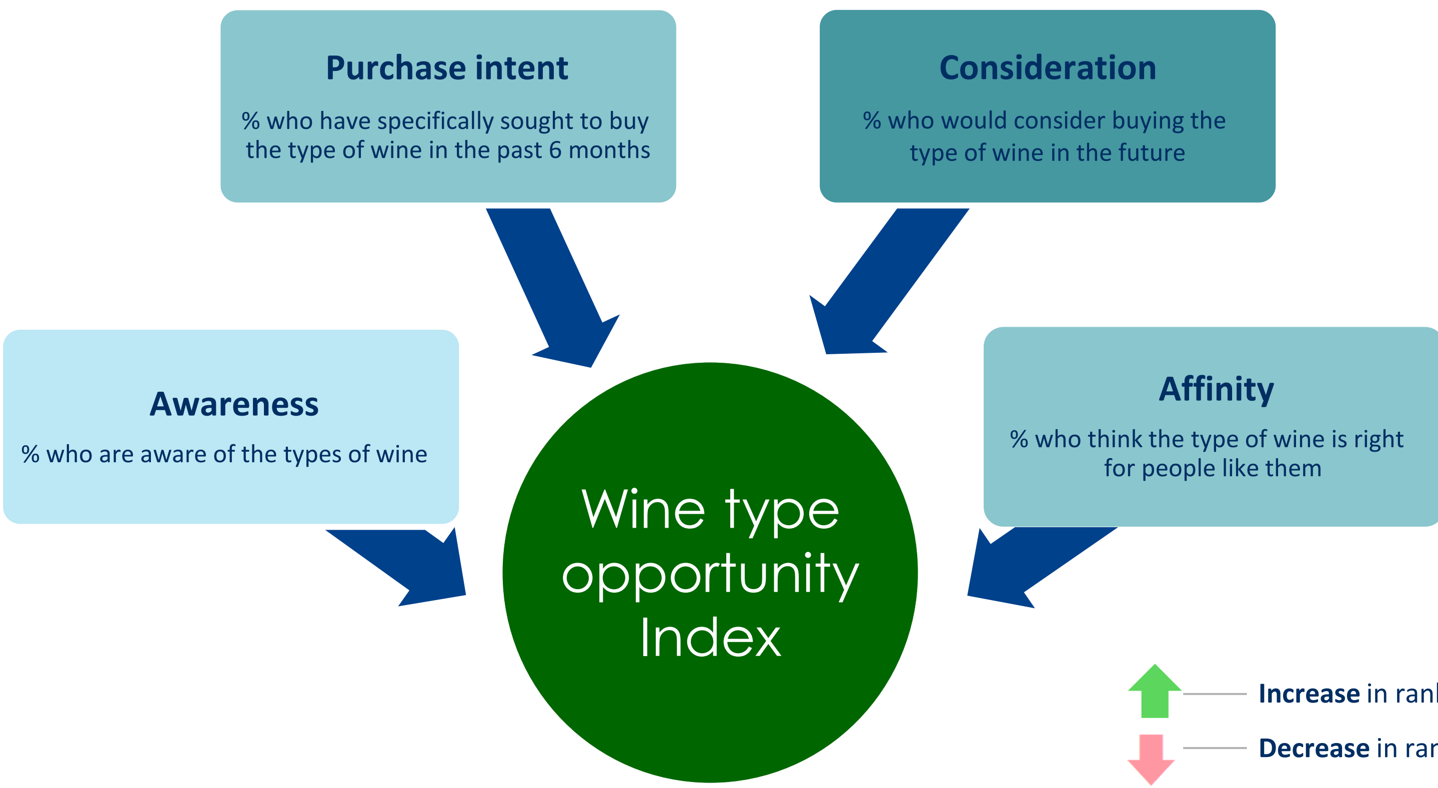
CONTEXT: WINE TYPE OPPORTUNITY INDEX

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**



- **Increase** in rank position since 2018 / 2019
- **Decrease** in rank position since 2018 / 2019
- **No change** in rank position since 2018 / 2019

WINE TYPE OPPORTUNITY INDEX

The ranking of the opportunity for alternative wine types in 2021 remained stable vs. 2019, although there has been a decline in the ***level*** of opportunity – with the opportunity score decreasing for the majority of wine types

	Type of wine	2021 weighted opportunity index	2019 score difference	2019 rank difference
1st	Organic wine	47.9	-0.1	=
2nd	Sustainably produced wine	42.1	-2.1	=
3rd	Environmentally friendly wine	41.1	0.2	1 ↑
4th	Fairtrade wine	38.6	-2.7	-1 ↓
5th	Preservative free wine	37.3	-1.7	=
6th	Sulphite free wine	34.2	-2.7	=
7th	Wine from a carbon neutral winery	32.1	-0.5	=
8th	Lower alcohol wine	31.4	-0.2	=
9th	Orange / skin contact wine	27.6	-3.0	=
10th	Biodynamic wine	27.4	-1.2	=
11th	Non-alcoholic wine	24.9	-1.7	=
12th	Vegan wine	22.1	-3.5	=
13th	Vegetarian wine	21.8	1.5	=

= top 5 wine types per measure

= score increased compared with 2019

= score decreased compared with 2019

Source: Wine Intelligence, Vinitrac® 2019 (n=16,704) and 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

GLOBAL WINE TYPE OPPORTUNITY INDEX 2021

In line with the majority of global markets, the opportunity for lower- and non-alcoholic wine remains lower in the US compared with other alternative wine types

Rank	Type of wine	AUS	BEL	BRA	CAN	DEU	FRA	IRL	JPN	NLD	NZL	PRT	KOR	ESP	SWE	CHE	GBR	USA	Weighted opportunity index
1st	Organic wine	42	47	48	44	54	56	51	50	46	38	32	48	33	65	54	45	48	47.9
2nd	Sustainably produced wine	42	40	52	39	46	31	45	28	38	39	46	36	45	45	45	43	45	42.1
3rd	Environmentally friendly wine	39	30	45	36	39	41	43	33	31	39	30	46	51	40	41	40	43	41.1
4th	Fairtrade wine	36	44	35	35	45	31	49	26	43	30	29	39	40	50	40	53	40	38.6
5th	Preservative free wine	40	28	49	34	30	30	35	55	25	27	32	33	32	31	27	35	38	37.3
6th	Sulphite free wine	36	36	27	34	28	45	35	37	24	29	35	23	39	27	31	34	37	34.2
7th	Wine from a carbon neutral winery	33	26	35	28	33	24	35	28	21	30	25	28	32	32	28	36	38	32.1
8th	Lower alcohol wine	39	23	50	27	29	22	38	23	29	41	36	33	31	27	20	35	28	31.4
9th	Orange / skin contact wine	27	21	27	29	28	17	28	32	21	19	22	28	28	30	17	28	33	27.6
10th	Biodynamic wine	26	28	29	24	27	32	32	27	21	22	17	25	19	24	31	28	29	27.4
11th	Non-alcoholic wine	31	25	33	25	28	18	34	22	29	30	17	27	22	37	15	31	20	24.9
12th	Vegan wine	23	21	24	20	22	12	22	17	19	21	18	26	20	30	20	28	26	22.1
13th	Vegetarian wine	20	19	21	19	18	17	22	18	19	17	20	22	23	20	10	25	27	21.8

= ranks among the top 3 in the market

Source: Wine Intelligence, Vinitrac® 2019 (n=16,704) and 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

GLOBAL WINE TYPE OPPORTUNITY INDEX 2021

Awareness of lower- and non-alcoholic wines has increased in the last two years, although this is countered by declining purchase consideration and affinity levels

	Type of wine	Global wine type wine opportunity index			Global awareness index		Global sought to purchase index		Global consideration index		Global affinity index	
		2021 weighted opportunity index	2019 score difference	2019 rank difference	2021 weighted awareness index	2019 score difference	2021 weighted sought to purchase index	2019 score difference	2021 weighted consideration index	2019 score difference	2021 weighted affinity index	2019 score difference
1st	Organic wine	47.9	-0.1	=	53.7	1.8	27.3	1.4	58.4	-1.6	49.6	-2.6
2nd	Sustainably produced wine	42.1	-2.1	=	28.8	1.1	26.9	0.2	64.3	-3.1	56.6	-6.8
3rd	Environmentally friendly wine	41.1	0.2	1↑	27.1	3.4	27.4	0.4	62.3	0.0	55.8	-3.3
4th	Fairtrade wine	38.6	-2.7	-1↓	27.6	-1.3	23.9	0.2	59.3	-2.9	51.1	-6.1
5th	Preservative free wine	37.3	-1.7	=	25.2	1.0	25.1	0.4	57.3	-3.5	49.5	-5.6
6th	Sulphite free wine	34.2	-2.7	=	24.9	0.6	21.2	-1.5	53.2	-4.4	44.3	-6.2
7th	Wine from a carbon neutral winery	32.1	-0.5	=	10.9	2.0	26.1	-3.8	57.4	-1.6	48.3	-0.8
8th	Lower alcohol wine	31.4	-0.2	=	36.4	1.0	19.2	-1.1	36.0	-0.2	31.3	-0.9
9th	Orange / skin contact wine	27.6	-3.0	=	8.4	1.0	28.1	-5.5	49.0	-3.4	39.0	-5.8
10th	Biodynamic wine	27.4	-1.2	=	8.7	1.5	27.6	-0.3	49.2	0.6	38.1	-5.7
11th	Non-alcoholic wine	24.9	-1.7	=	39.3	-1.5	12.3	-2.0	23.3	-1.7	17.5	-1.8
12th	Vegan wine	22.1	-3.5	=	15.2	1.9	16.6	-5.0	34.8	-7.7	27.4	-6.6
13th	Vegetarian wine	21.8	1.5	=	8.5	1.5	21.0	2.4	35.2	1.4	31.0	0.9

= top 5 wine types per measure

= score <u>increased</u> compared with 2019

= score <u>decreased</u> compared with 2019

Source: Wine Intelligence, Vinitrac® 2019 (n=16,704) and 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

GLOBAL WINE TYPE OPPORTUNITY INDEX 2021

wine intelligence

INTENT TO PURCHASE COMPARED WITH 'NO CLAIM' CONTROL SAMPLE

Inline with other countries, purchase intent for lower- or non-alcoholic wine remains low in the US

Green = Relative strength within each market
Red = Relative weakness within each market

% who would be likely or very likely to buy each wine minus those Likely or very likely to buy the No Claim wine
Base = All Australian, Canadian, Swedish, UK and US regular wine drinkers (n≥500)

Bottle Tested	Australia	Canada	Sweden	UK	US
Award Winning	13%	10%	11%	14%	14%
Established 1870	8%	4%	7%	11%	8%
Natural Wine	7%	8%	5%	4%	9%
Organic* Wine	-3%	6%	13%	-4%	7%
Environmentally Friendly	-1%	7%	10%	3%	2%
Sustainably Produced	3%	5%	9%	5%	1%
Preservative Free	7%	3%	-3%	-6%	3%
Fairtrade	-3%	1%	14%	11%	-3%
Sulphite Free Wine	-1%	6%	3%	-8%	-4%
Carbon Neutral	-5%	-4%	-1%	-6%	-11%
Cannabis Infused	-14%	-7%	-10%	-24%	-12%
Biodynamic Wine	-16%	-10%	1%	-20%	-19%
Vegan Wine	-21%	-11%	-8%	-22%	-18%
Lower Alcohol Wine	-6%	-9%	-10%	-17%	-22%
Vegetarian Wine	-18%	-14%	-6%	-21%	-19%
Non Alcoholic Wine	-15%	-11%	-13%	-23%	-22%

Examples of bottles tested

*in the US 'Organic wine' was asked as 'wine made with organic grapes'
Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Canadian, Swedish, UK and US regular wine drinkers

vinitrac

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CANADA: KEY TAKEAWAYS

- **Lower-alcohol wine has lower awareness compared with non-alcoholic wine, yet it performs better overall due to its connection with consumers**
  - Lower-alcohol wine opportunity index has decreased since 2019
  - Likewise, sought to purchase, consideration and affinity of non-alcoholic wine have slightly decreased as well, whilst awareness has increased

- **Younger regular wine drinkers in Canada are more likely than all consumers to actively reduce the amount of alcohol they drink** by switching to both lower-alcohol and no-alcohol drinks or to cannabis products
  - Women and consumers over 55 are more likely to be aware of non-alcoholic wine compared with all Canadian regular wine drinkers
  - However, younger consumers are more likely than all wine drinkers to seek to purchase non-alcoholic wine and to consider purchasing lower alcohol wine in the future
  - Additionally, wine drinkers under 35 in Canada are more likely than all regular wine drinkers to consider non-alcoholic wine as right for people like them, though from a low base

- The main reason for consumers to **choose lower alcohol wine is linked with personal health**

- The main barrier for consumers **not to choose lower alcohol wine** in Canada is that it does not contain enough alcohol to feel an effect

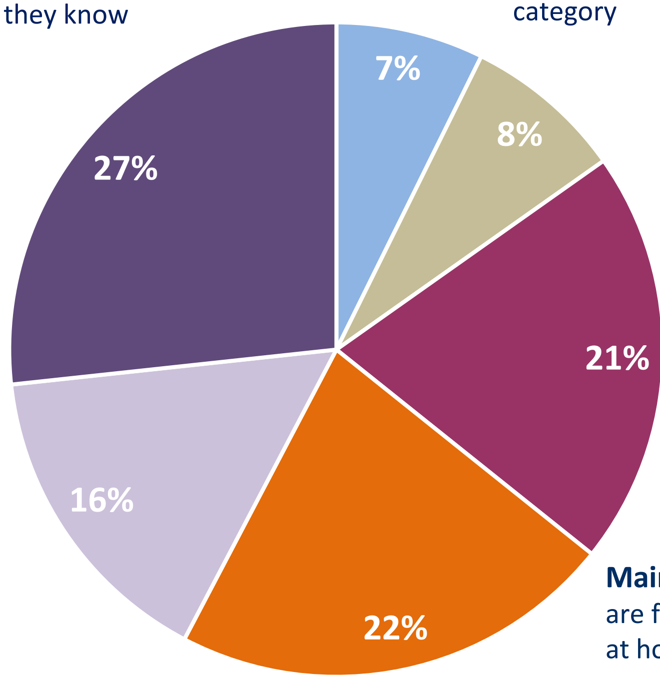
- **Labelling wine as lower-alcohol or non-alcoholic does not drive purchase intent** in Canada

CANADIAN PORTRAITS: WINE DRINKER SEGMENTATION (2021)

% share of Canadian regular wine drinkers by Portraits segments Canada 2021

Kitchen Casuals: Infrequent, mid-aged to older wine drinkers who show little interest in the wine category and tend to stick to the narrow range of wines that they know

Engaged Explorers: Younger and mid-aged, confident wine drinkers who enjoy discovering new wine. Wine is important to their lifestyles so they are willing to invest time and money in the category



Enthusiastic Treaters: The youngest and most frequent wine drinking group, they have a strong interest in the category, yet lack some confidence in their own wine knowledge

Contented Occasional: The least frequent wine drinkers and an older segment, with fairly low wine knowledge and little interest in learning more. They are likely to stick to the brands and styles of wine they know and trust

Mainstream Matures: The oldest segment, they are frequent wine drinkers who enjoy drinking wine at home in the evening, and who, through their experience in the category, feel competent in their wine knowledge

Social Newbies: Younger wine drinkers, who drink wine fairly infrequently, but who enjoy wine in social settings out with friends, relying heavily on recommendations

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

ALCOHOL MODERATION

Younger regular wine drinkers in Canada are more likely than all consumers to actively reduce the amount of alcohol they drink by switching to both lower alcohol and no-alcohol drinks or to cannabis products

Alcohol moderation

% who selected the following statements
Base = All Canadian regular wine drinkers (n=1,013)

		Gender		Age			Wine Involvement		
	All Canadian regular wine drinkers	Male	Female	19-34	35-54	55+	Low	Medium	High
n=	*1,013*	*512*	*501*	*292*	*350*	*372*	*247*	*425*	*340*
I'm NOT actively reducing the amount of alcohol I drink	63%	64%	62%	53%	64%	71%	57%	63%	67%
I'm actively reducing the amount of alcohol I drink by not drinking alcohol at some occasions	21%	19%	23%	24%	17%	23%	27%	20%	18%
I'm actively reducing the amount of alcohol I drink by switching to lower alcohol options at some occasions	13%	15%	12%	23%	14%	5%	15%	12%	14%
I'm actively reducing the amount of alcohol I drink by switching to non-alcoholic drinks at some occasions	13%	13%	13%	20%	10%	11%	12%	15%	11%
I'm actively reducing the amount of alcohol I drink by switching to cannabis products	4%	6%	3%	9%	5%	1%	3%	6%	3%

Red / Blue: Statistically significantly higher / lower than all Canada regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, October 2020 (n=1,013), Canadian regular wine drinkers

ALCOHOL MODERATION

Younger segments Enthusiastic Treaters and Social Newbies are more likely to be moderating their alcohol consumption, although it should be noted that they are typically more frequent wine drinkers in general

Alcohol moderation: By Portraits

% who selected the following statements
Base = All Canadian regular wine drinkers (n=1,013)

		Portraits					
	All Canadian regular wine drinkers	Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
n=	*1,013*	*74*	*80*	*208*	*222*	*158*	*271*
I'm NOT actively reducing the amount of alcohol I drink	63%	78%	44%	69%	53%	62%	69%
I'm actively reducing the amount of alcohol I drink by not drinking alcohol at some occasions	21%	15%	24%	18%	25%	23%	19%
I'm actively reducing the amount of alcohol I drink by switching to lower alcohol options at some occasions	13%	7%	34%	8%	20%	13%	7%
I'm actively reducing the amount of alcohol I drink by switching to non-alcoholic drinks at some occasions	13%	9%	21%	14%	17%	9%	10%
I'm actively reducing the amount of alcohol I drink by switching to cannabis products	4%	3%	8%	1%	8%	4%	4%

Red / Blue: Statistically significantly higher / lower than all Canada regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, October 2020 (n=1,013), Canadian regular wine drinkers

WINE TYPE OPPORTUNITY INDEX

Lower-alcohol wine has lower awareness compared with non-alcoholic wine, yet it performs better overall due to its connection with consumers

Canada Alternative wine Opportunity Index

	Type of wine	Base = All sample	Base = Those who are aware of the following types of wine					
		Awareness	Sought to purchase	Future purchase consideration	Affinity	2021 opportunity index	2019 opportunity index	2019 rank difference
1st	Organic wine	51%	22%	55%	44%	43.8	42.9	=
2nd	Sustainably produced wine	20%	22%	66%	58%	38.7	40.3	=
3rd	Environmentally friendly wine	20%	25%	62%	51%	36.5	36.9	=
4th	Fairtrade wine	21%	17%	59%	53%	35.3	35.3	1 ↑
5th	Sulphite free wine	25%	16%	55%	47%	34.4	35.3	-1 ↓
6th	Preservative free wine	17%	19%	56%	51%	33.6	34.6	=
7th	Orange / skin contact wine	8%	33%	62%	35%	29.1	26.3	2 ↑
8th	Wine from a carbon-neutral winery	7%	17%	62%	42%	27.9	30.0	-1 ↓
9th	Lower alcohol wine	30%	14%	34%	29%	27.0	28.7	-1 ↓
10th	Non-alcoholic wine	45%	9%	17%	16%	24.9	24.8	1 ↑
11th	Biodynamic wine	4%	26%	52%	33%	24.3	26.0	-1 ↓
12th	Vegan wine	12%	15%	33%	29%	20.5	20.8	=
13th	Vegetarian wine	7%	15%	34%	29%	19.1	20.6	=

Source: Wine Intelligence, Vinitrac® Canada, October 2017, March 2019 and October 2020 (n≥1,013), Canadian regular wine drinkers

WINE TYPE OPPORTUNITY INDEX

Similar to other markets, there has been a significant increase in the proportion of consumers aware of a variety of alternative wine types since 2019, though this hasn't translated into higher usage and consideration

Canada Alternative wine Opportunity Index

Type of wine	Base = All sample			Base = Those who are aware of organic wine								
	Awareness			Sought to Purchase			Consideration			Affinity		
	2019	2020	1-year tracking	2019	2020	1-year tracking	2019	2020	1-year tracking	2019	2020	1-year tracking
Organic wine	43%	51%	↑	21%	22%	→	57%	55%	→	50%	44%	↓
Sustainably produced wine	18%	20%	→	20%	22%	→	70%	66%	→	65%	58%	→
Environmentally friendly wine	17%	20%	↑	21%	25%	→	61%	62%	→	59%	51%	→
Fairtrade wine	17%	21%	↑	18%	17%	→	60%	59%	→	56%	53%	→
Sulphite free wine	24%	25%	→	18%	16%	→	58%	55%	→	49%	47%	→
Preservative free wine	19%	17%	→	19%	19%	→	57%	56%	→	52%	51%	→
Orange / skin contact wine	6%	8%	↑	24%	33%	→	49%	62%	↑	40%	35%	→
Wine from a carbon-neutral winery	6%	7%	→	24%	17%	→	57%	62%	→	48%	42%	→
Lower alcohol wine	32%	30%	→	15%	14%	→	37%	34%	→	31%	29%	→
Non-alcoholic wine	41%	45%	→	10%	9%	→	21%	17%	→	17%	16%	→
Biodynamic wine	5%	4%	→	23%	26%	→	52%	52%	→	40%	33%	→
Vegan wine	9%	12%	↑	15%	15%	→	38%	33%	→	30%	29%	→
Vegetarian wine	6%	7%	→	16%	15%	→	41%	34%	→	30%	29%	→

: sample size < 50

↑ / ↓ : Statistically significantly higher / lower than the March 2019 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Canada, October 2017, March 2019 and October 2020 (n≥1,013), Canadian regular wine drinkers

ALTERNATIVE WINES AWARENESS

Women and consumers over 55 are more likely to be aware of non-alcoholic wine compared with all Canadian regular wine drinkers

Alternative wines awareness: By gender, age and involvement

% who are aware of the following types of wine
Base = All Canadian regular wine drinkers (n=1,013)

		Gender		Age			Wine Involvement		
	All Canadian regular wine drinkers	Male	Female	19-34	35-54	55+	Low	Medium	High
n=	*1,013*	*512*	*501*	*292*	*350*	*372*	*247*	*425*	*340*
Organic wine	51%	49%	53%	48%	48%	55%	40%	53%	57%
Non-alcoholic wine	45%	39%	51%	44%	36%	54%	41%	46%	47%
Lower alcohol wine	30%	28%	32%	26%	30%	32%	25%	28%	35%
Sulphite free wine	25%	26%	24%	24%	20%	31%	20%	24%	31%
Fairtrade wine	21%	19%	22%	21%	18%	23%	13%	18%	29%
Environmentally friendly wine	20%	21%	18%	18%	19%	21%	13%	19%	25%
Sustainably produced wine	20%	20%	20%	20%	22%	17%	10%	20%	27%
Preservative free wine	17%	18%	17%	17%	15%	19%	13%	17%	21%
Vegan wine	12%	11%	12%	15%	13%	7%	5%	12%	16%
Orange / skin contact wine	8%	8%	9%	11%	8%	6%	5%	8%	11%
Wine from a carbon-neutral winery	7%	9%	6%	10%	8%	5%	6%	8%	9%
Vegetarian wine	7%	6%	8%	10%	7%	4%	3%	6%	11%
Biodynamic wine	4%	5%	3%	4%	5%	3%	2%	3%	7%
None of these	20%	22%	18%	18%	23%	18%	30%	18%	15%

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

ALTERNATIVE WINES AWARENESS

Mainstream Matures are more aware of lower- and non-alcoholic wine, in line with their higher level of wine knowledge that has been built up over time in the category

Alternative wines awareness: By Portraits

% who are aware of the following types of wine
Base = All Canadian regular wine drinkers (n=1,013)

		Portraits					
	All Canadian regular wine drinkers	Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
n=	1,013	74	80	208	222	158	271
Organic wine	51%	81%	44%	65%	46%	42%	43%
Non-alcoholic wine	45%	60%	37%	53%	40%	51%	38%
Lower alcohol wine	30%	47%	32%	32%	30%	30%	22%
Sulphite free wine	25%	46%	20%	34%	19%	19%	24%
Fairtrade wine	21%	31%	24%	25%	19%	14%	18%
Environmentally friendly wine	20%	40%	23%	21%	20%	16%	15%
Sustainably produced wine	20%	41%	21%	25%	17%	13%	16%
Preservative free wine	17%	34%	23%	21%	15%	11%	13%
Vegan wine	12%	29%	14%	11%	13%	8%	8%
Cannabis infused wine	10%	18%	22%	9%	11%	9%	5%
Orange / skin contact wine	8%	17%	15%	8%	10%	4%	5%
Wine from a carbon-neutral winery	7%	18%	9%	7%	10%	6%	4%
Vegetarian wine	7%	19%	7%	5%	7%	6%	5%
Biodynamic wine	4%	12%	4%	3%	7%	1%	2%
None of these	20%	6%	11%	14%	17%	23%	32%

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

ALTERNATIVE WINES SOUGHT TO PURCHASE

Canadian consumers aged 19-34 are more likely than all regular wine drinkers to purchase non-alcoholic wine

Alternative wines sought to purchase: By gender, age and involvement

% who have sought to purchase the following types of wine in the past 6 months
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	19-34	35-54	55+	Low	Medium	High
Orange / skin contact wine	33%	32%	33%	43%	25%	27%	35%	31%	33%
Biodynamic wine	26%	27%	25%	34%	22%	23%	0%	19%	36%
Environmentally friendly wine	25%	27%	23%	33%	31%	14%	14%	27%	27%
Organic wine	22%	27%	18%	28%	24%	18%	12%	24%	26%
Sustainably produced wine	22%	28%	17%	35%	22%	11%	8%	20%	28%
Preservative free wine	19%	22%	16%	26%	21%	12%	12%	19%	22%
Wine from a carbon-neutral winery	17%	15%	20%	26%	18%	0%	25%	25%	4%
Fairtrade wine	17%	18%	15%	20%	21%	11%	14%	12%	22%
Sulphite free wine	16%	17%	15%	25%	10%	14%	8%	18%	18%
Vegan wine	15%	13%	16%	18%	17%	7%	15%	14%	15%
Vegetarian wine	15%	16%	14%	25%	7%	7%	42%	12%	11%
Lower alcohol wine	14%	16%	12%	22%	17%	7%	14%	12%	16%
Non-alcoholic wine	9%	10%	8%	19%	7%	4%	9%	7%	11%
None of these	61%	59%	63%	49%	56%	76%	73%	63%	51%

: sample size < 50
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

ALTERNATIVE WINES SOUGHT TO PURCHASE

Enthusiastic Treaters are more likely to have sought to purchase non-alcoholic wines though this is based on small sample sizes

Alternative wines sought to purchase: By Portraits

% who have sought to purchase the following types of wine in the past 6 months
Base = Those who are aware of the following types of wine

		Portraits					
	Those who are aware of the following types of wine	Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
Orange / skin contact wine	33%	47%	55%	24%	27%	18%	24%
Biodynamic wine	26%	34%	67%	15%	27%	0%	15%
Environmentally friendly wine	25%	25%	38%	18%	37%	20%	16%
Organic wine	22%	30%	30%	17%	26%	18%	21%
Sustainably produced wine	22%	22%	48%	20%	27%	27%	9%
Cannabis infused wine	19%	21%	43%	15%	13%	23%	0%
Preservative free wine	19%	16%	41%	13%	23%	11%	17%
Wine from a carbon-neutral winery	17%	7%	27%	0%	24%	22%	25%
Fairtrade wine	17%	36%	23%	12%	26%	9%	6%
Sulphite free wine	16%	15%	26%	13%	30%	17%	8%
Vegan wine	15%	4%	46%	4%	19%	15%	14%
Vegetarian wine	15%	0%	17%	0%	32%	21%	15%
Lower alcohol wine	14%	4%	21%	12%	18%	10%	20%
Non-alcoholic wine	9%	7%	29%	5%	15%	5%	6%
None of these	61%	44%	36%	71%	50%	71%	72%

: sample size < 50
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

ALTERNATIVE WINES CONSIDERATION

Younger consumers in Canada are more likely than all wine drinkers to consider purchasing lower-alcohol wine in the future

Alternative wines consideration: By gender, age and involvement

% who would consider purchasing the following types of wine in the future
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	19-34	35-54	55+	Low	Medium	High
Sustainably produced wine	66%	63%	70%	72%	69%	58%	66%	59%	73%
Orange / skin contact wine	62%	55%	69%	70%	70%	40%	76%	56%	63%
Environmentally friendly wine	62%	54%	72%	64%	63%	60%	57%	63%	63%
Wine from a carbon-neutral winery	62%	59%	67%	64%	64%	55%	69%	60%	61%
Fairtrade wine	59%	53%	65%	60%	65%	54%	67%	52%	62%
Preservative free wine	56%	54%	58%	50%	53%	62%	42%	64%	54%
Sulphite free wine	55%	49%	61%	58%	56%	52%	53%	59%	52%
Organic wine	55%	57%	53%	55%	60%	50%	44%	55%	60%
Biodynamic wine	52%	58%	43%	68%	39%	54%	50%	64%	47%
Vegetarian wine	34%	36%	33%	42%	33%	20%	41%	24%	41%
Lower alcohol wine	34%	35%	32%	47%	36%	24%	33%	37%	31%
Vegan wine	33%	29%	36%	40%	37%	14%	52%	34%	26%
Non-alcoholic wine	17%	16%	18%	23%	23%	10%	22%	18%	13%
None of these	28%	27%	28%	20%	23%	38%	33%	29%	24%

: sample size < 50
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

ALTERNATIVE WINES CONSIDERATION

There are no differences in terms of considering lower- and non-alcoholic wines amongst the segments

Alternative wines consideration: By Portraits

% who would consider purchasing the following types of wine in the future
Base = Those who are aware of the following types of wine

		Portraits					
	Those who are aware of the following types of wine	Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
Sustainably produced wine	66%	72%	57%	67%	68%	68%	62%
Orange / skin contact wine	62%	54%	67%	63%	68%	67%	53%
Environmentally friendly wine	62%	67%	36%	68%	69%	64%	55%
Wine from a carbon-neutral winery	62%	51%	86%	55%	62%	78%	55%
Fairtrade wine	59%	69%	36%	64%	56%	73%	55%
Preservative free wine	56%	51%	40%	59%	58%	62%	59%
Sulphite free wine	55%	51%	43%	61%	57%	64%	47%
Organic wine	55%	66%	38%	57%	58%	45%	55%
Biodynamic wine	52%	46%	67%	44%	54%	0%	72%
Cannabis infused wine	50%	63%	65%	60%	43%	27%	42%
Vegetarian wine	34%	29%	30%	58%	34%	31%	27%
Lower alcohol wine	34%	18%	33%	29%	42%	26%	46%
Vegan wine	33%	27%	48%	31%	37%	30%	28%
Non-alcoholic wine	17%	11%	28%	13%	22%	16%	18%
None of these	28%	20%	23%	30%	22%	33%	33%

: sample size < 50
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

ALTERNATIVE WINES AFFINITY

Although from a low base, wine drinkers under 35 in Canada are more likely than all regular wine drinkers to consider non-alcoholic wine as right for people like them

Alternative wines affinity: By gender, age and involvement

% who think the following types of wine are right for people like them
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	19-34	35-54	55+	Low	Medium	High
Sustainably produced wine	58%	52%	64%	62%	61%	51%	64%	54%	60%
Fairtrade wine	53%	52%	53%	51%	60%	49%	57%	49%	54%
Preservative free wine	51%	45%	59%	57%	50%	49%	55%	51%	50%
Environmentally friendly wine	51%	49%	53%	46%	52%	53%	30%	59%	51%
Sulphite free wine	47%	41%	53%	50%	50%	44%	55%	50%	41%
Organic wine	44%	45%	43%	48%	45%	40%	32%	46%	48%
Wine from a carbon-neutral winery	42%	34%	54%	53%	38%	30%	33%	50%	37%
Orange / skin contact wine	35%	31%	38%	34%	45%	23%	58%	37%	26%
Biodynamic wine	33%	39%	23%	34%	21%	47%	33%	27%	35%
Lower alcohol wine	29%	24%	34%	38%	30%	22%	39%	27%	26%
Vegetarian wine	29%	21%	35%	35%	18%	33%	54%	38%	16%
Vegan wine	29%	22%	35%	42%	27%	10%	38%	38%	17%
Non-alcoholic wine	16%	13%	18%	24%	22%	7%	23%	18%	9%
None of these	34%	34%	34%	26%	33%	42%	40%	35%	30%

: sample size < 50
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

ALTERNATIVE WINES AFFINITY

Affinity for lower- and non-alcoholic wine is stronger among younger and curious consumers Enthusiastic Treaters, albeit from a small base

Alternative wines affinity: By Portraits

% who think the following types of wine are right for people like them
Base = Those who are aware of the following types of wine

	Those who are aware of the following types of wine	Portraits					
		Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
Sustainably produced wine	58%	65%	61%	54%	58%	72%	49%
Fairtrade wine	53%	74%	48%	45%	49%	69%	48%
Preservative free wine	51%	44%	52%	36%	68%	56%	58%
Environmentally friendly wine	51%	49%	48%	47%	59%	49%	50%
Sulphite free wine	47%	41%	43%	45%	55%	60%	43%
Organic wine	44%	55%	41%	40%	47%	38%	46%
Wine from a carbon-neutral winery	42%	36%	72%	34%	43%	43%	35%
Cannabis infused wine	40%	44%	53%	44%	38%	16%	45%
Orange / skin contact wine	35%	32%	46%	26%	41%	48%	23%
Biodynamic wine	33%	44%	31%	29%	27%	0%	45%
Lower alcohol wine	29%	9%	28%	26%	36%	28%	38%
Vegetarian wine	29%	15%	33%	30%	26%	40%	35%
Vegan wine	29%	18%	47%	27%	30%	30%	29%
Non-alcoholic wine	16%	4%	31%	7%	24%	20%	16%
None of these	34%	28%	20%	38%	29%	43%	38%

: sample size < 50
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

METHODOLOGY: PURCHASE INTENT: BASED ON CLAIMS ON WINE LABELS

Bottle with **no claim** tested against bottles shown **with claim** – the claims were not highlighted nor pointed out; the bottles were shown in a randomized order to avoid bias

Bottles tested:

No Claim Bottle

Fairtrade

Sulphite Free Wine

Award winning

Sustainably Produced

Environmentally-friendly

Natural Wine

Established 1870

Biodynamic Wine

Carbon Neutral

Vegan Wine

Preservative Free

Vegetarian Wine

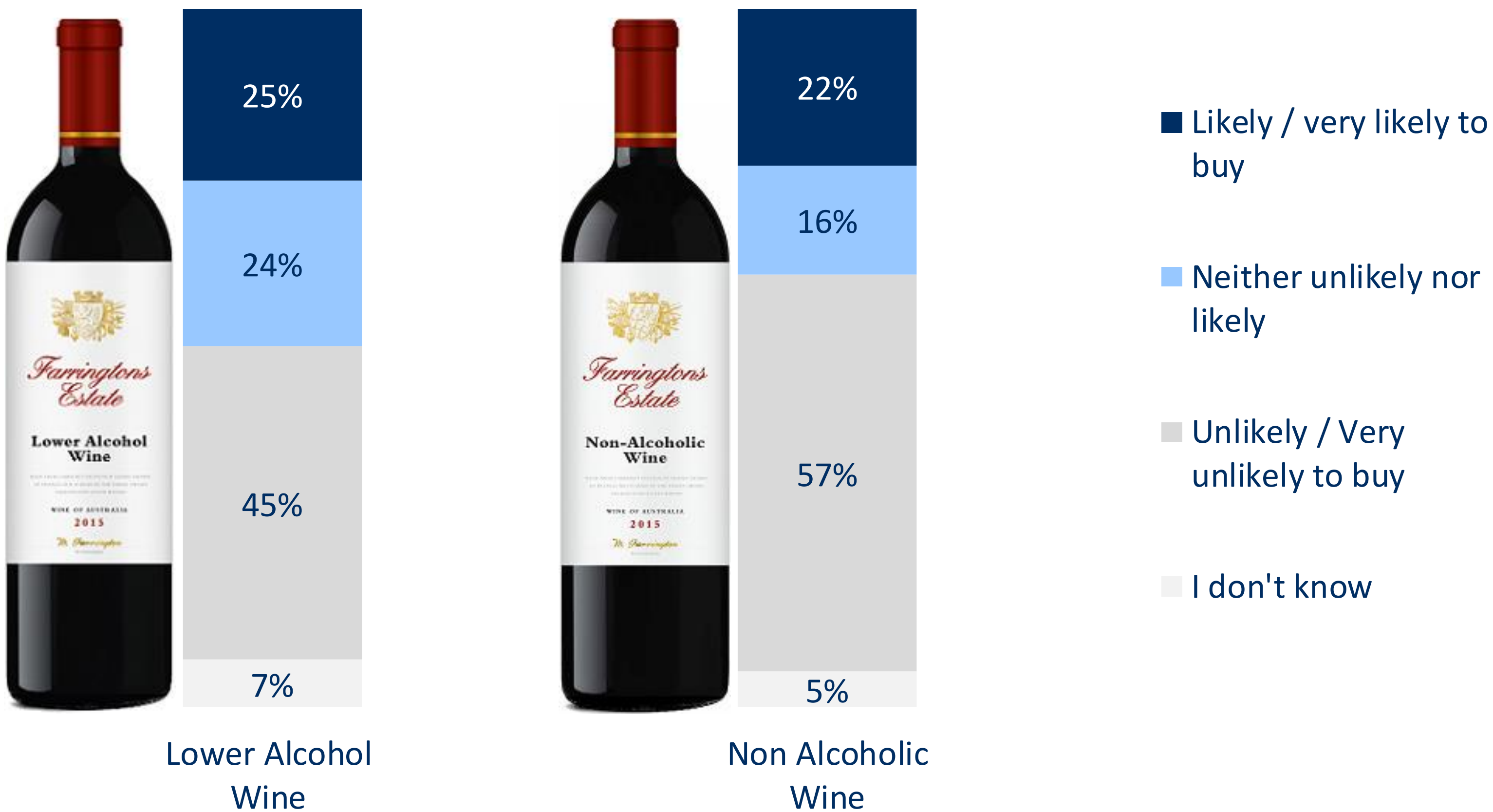
Organic

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)



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

PURCHASE INTENT OF WINE TYPES

Compared with last year, consumers in Canada are less likely to purchase a variety of bottles; bottles showing lower- and non-alcoholic claims remained stable

Intent to purchase: Tracking vs March 2019

% who would be likely or very likely to purchase the following wines
Base = All Canadian regular wine drinkers (n=1,013)

		2019	2020	Tracking
	n=	*2,479*	*1,013*	vs. '19
1	Award Winning	49%	44%	↓
2	Natural Wine	45%	41%	→
3	Environmentally Friendly	42%	40%	→
4	Sulphite Free Wine	39%	39%	→
5	Organic	39%	39%	→
6	Sustainably Produced	43%	38%	↓
7	Established 1870	41%	38%	↓
8	Preservative Free	43%	37%	↓
9	Fairtrade	40%	34%	↓
10	Carbon Neutral	32%	29%	→
11	Lower Alcohol Wine	25%	25%	→
12	Biodynamic Wine	25%	23%	→
13	Non Alcoholic Wine	22%	22%	→
14	Vegan Wine	21%	22%	→
15	Vegetarian Wine	21%	19%	→

↑ / ↓ : Statistically significantly higher / lower than the March 2019 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, March 2019 & October 2020 (n≥1,013), Canadian regular wine drinkers

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)

		Gender		Age			Wine Involvement		
	All Canadian regular wine drinkers	Male	Female	19-34	35-54	55+	Low	Medium	High
n=	*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

PURCHASE INTENT OF WINE TYPES

Younger and curious segments such as Social Newbies and Enthusiastic Treaters are more open to buying lower- and non-alcoholic wines compared with all regular wine drinkers

Intent to purchase: By Portraits

% who would be likely or very likely to purchase the following wines
Base = All Canadian regular wine drinkers (n=1,013)

		Portraits					
	All Canadian regular wine drinkers	Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
n=	*1,013*	*74*	*80*	*208*	*222*	*158*	*271*
Award Winning	44%	60%	47%	45%	54%	27%	38%
Natural Wine	41%	48%	45%	35%	59%	36%	30%
Environmentally Friendly	40%	47%	48%	36%	48%	33%	36%
Sulphite Free Wine	39%	48%	51%	33%	47%	26%	39%
Organic	39%	59%	50%	32%	50%	26%	37%
Sustainably Produced	38%	47%	45%	38%	43%	33%	32%
Established 1870	38%	49%	47%	39%	50%	28%	27%
Preservative Free	37%	43%	53%	39%	45%	17%	33%
Fairtrade	34%	53%	46%	37%	42%	19%	28%
Control Bottle	33%	43%	56%	27%	41%	22%	28%
Carbon Neutral	29%	34%	41%	25%	37%	22%	26%
Cannabis Infused	26%	30%	56%	24%	28%	18%	22%
Lower Alcohol Wine	25%	17%	30%	20%	36%	19%	23%
Biodynamic Wine	23%	27%	38%	16%	26%	14%	23%
Non-Alcoholic Wine	22%	19%	36%	21%	29%	18%	16%
Vegan Wine	22%	27%	42%	18%	26%	11%	19%
Vegetarian Wine	19%	25%	38%	12%	31%	12%	13%

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

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

		Gender		Age			Wine Involvement		
	All Canadian regular wine drinkers	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%

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

LOWER-ALCOHOL WINE PURCHASE MOTIVATION

Whilst Engaged Explorers like to be seen drinking lower-alcohol wine, Social Newbies are more driven by fewer headaches as a consequence

Lower Alcohol wine Purchase Motivation: By Portraits

% 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

		Portraits					
	All Canadian regular wine drinkers	Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
It's better for my health	53%	36%	70%	67%	51%	56%	43%
I enjoy the taste	45%	51%	35%	42%	52%	28%	49%
Less calories than other wines	38%	16%	0%	53%	41%	41%	40%
I like to stay in control	33%	31%	61%	42%	38%	0%	26%
Price is lower than standard wine	29%	15%	0%	29%	37%	36%	29%
It gives me fewer headaches	28%	0%	21%	14%	51%	30%	20%
It goes better with food	27%	29%	31%	24%	38%	7%	23%
I'm on a diet	23%	31%	0%	10%	33%	29%	23%
I will be driving	19%	22%	45%	24%	16%	21%	10%
Most of my friends are drinking it	13%	0%	10%	14%	22%	8%	10%
I like to be seen drinking it	7%	36%	10%	10%	8%	0%	0%
I would not consider drinking lower alcohol wines	1%	0%	0%	0%	0%	0%	3%
Other	1%	0%	10%	0%	0%	0%	0%
None of these / no opinion	5%	16%	0%	10%	0%	0%	10%

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

LOWER-ALCOHOL WINE BARRIERS TO PURCHASE

The main barriers to purchase lower-alcohol wine for Canadian wine drinkers are lack of alcohol 'effect' and dislike of the taste

Lower-alcohol wine barriers to purchase: By gender, age and involvement

% who selected the following statements as reasons not to buy lower alcohol wines
Base = Those who are aware of lower alcohol wine but have not sought to buy in the past 6 months or would not consider buying it in the future

		Gender		Age			Wine Involvement		
	All Canadian regular wine drinkers	Male	Female	19-34	35-54	55+	Low	Medium	High
Does not contain enough alcohol to feel an effect	31%	32%	29%	43%	25%	29%	35%	25%	33%
I dislike the taste	30%	29%	30%	17%	35%	31%	23%	34%	29%
My favorite wine does not come in a lower alcohol version	25%	36%	16%	22%	20%	30%	21%	33%	20%
Lower quality than standard wine	22%	29%	17%	23%	24%	21%	15%	29%	20%
It's not really wine	22%	27%	18%	17%	25%	22%	23%	17%	27%
Poor quality wines	18%	24%	13%	9%	12%	26%	15%	19%	19%
My friends don't seem to drink it	12%	17%	8%	20%	3%	14%	16%	13%	9%
Lower alcohol wines are an aberration	9%	14%	5%	11%	5%	11%	8%	8%	10%
I'm not aware of these products	9%	10%	8%	3%	8%	12%	18%	6%	8%
Difficult to find where I shop for wine	7%	8%	6%	7%	8%	6%	5%	8%	6%
Higher price than standard wine	5%	6%	5%	4%	3%	8%	10%	8%	1%
They are mass produced wines	5%	6%	5%	11%	3%	5%	2%	8%	5%
It's not clear from the bottle what it is	5%	6%	5%	3%	6%	6%	7%	4%	5%
I would be embarrassed to be seen drinking it	4%	6%	2%	9%	5%	1%	6%	4%	3%
I can't think of any reason not to buy lower alcohol wines	11%	6%	15%	8%	6%	15%	5%	11%	14%
Other	2%	3%	1%	0%	5%	1%	3%	3%	1%
None of these / no opinion	7%	8%	7%	9%	6%	8%	13%	3%	9%

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

LOWER-ALCOHOL WINE BARRIERS TO PURCHASE

Enthusiastic Treaters are not buying lower-alcohol wine due to the lack of effect and difficulty to find, whilst Social Newbies are more worried about social consequences

Lower-alcohol wine barriers to purchase: By Portraits

% who selected the following statements as reasons not to buy lower alcohol wines
Base = Those who are aware of lower alcohol wine but have not sought to buy in the past 6 months or would not consider buying it in the future

		Portraits					
	All Canadian regular wine drinkers	Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
Does not contain enough alcohol to feel an effect	31%	20%	56%	34%	29%	26%	29%
I dislike the taste	30%	24%	20%	37%	45%	20%	22%
My favorite wine does not come in a lower alcohol version	25%	21%	26%	36%	18%	16%	32%
Lower quality than standard wine	22%	31%	27%	26%	29%	12%	10%
It's not really wine	22%	38%	31%	20%	12%	26%	13%
Poor quality wines	18%	20%	32%	19%	18%	20%	3%
My friends don't seem to drink it	12%	7%	12%	14%	12%	15%	10%
Lower alcohol wines are an aberration	9%	14%	6%	4%	12%	6%	13%
I'm not aware of these products	9%	7%	6%	4%	15%	9%	12%
Difficult to find where I shop for wine	7%	14%	21%	4%	0%	7%	3%
Higher price than standard wine	5%	4%	0%	7%	0%	10%	9%
They are mass produced wines	5%	0%	21%	6%	3%	9%	0%
It's not clear from the bottle what it is	5%	0%	0%	4%	14%	3%	7%
I would be embarrassed to be seen drinking it	4%	4%	6%	0%	15%	0%	0%
I can't think of any reason not to buy lower alcohol wines	11%	4%	0%	13%	11%	15%	16%
Other	2%	3%	0%	4%	3%	0%	0%
None of these / no opinion	7%	10%	0%	9%	3%	11%	7%

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

CONTENTS

METHODOLOGY: WINE TYPE OPPORTUNITY REPORT MARKETS

Wine Type Opportunity Index 2018	Wine Type Opportunity Index 2019	Wine Type Opportunity Index 2021
12,000 consumers	16,000 consumers	17,000 consumers
✓ Australia	✓ Australia	✓ Australia
✓ Canada	✓ Belgium	✓ Belgium
✓ Finland	✓ Belgium	✓ Brazil
✓ Germany	✓ Canada	✓ Canada
✓ Ireland	✓ Finland	✓ France
✓ Japan	✓ Germany	✓ Germany
✓ New Zealand	✓ Hong Kong	✓ Ireland
✓ Portugal	✓ Japan	✓ Japan
✓ Sweden	✓ Netherlands	✓ Netherlands
✓ UK	✓ New Zealand	✓ New Zealand
✓ US	✓ Portugal	✓ Portugal
	✓ Spain	✓ South Korea
	✓ Sweden	✓ Spain
	✓ UK	✓ Sweden
	✓ US	✓ Switzerland
		✓ UK
		✓ US

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:

		Mar-19	*Oct-19*
	n=	*1,000*	*1,013*
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

Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

Definitions and Interpretation

The “Agreement” means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

“WI” is Wine Intelligence Ltd, trading as Wine Intelligence.

“Customer” means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

“Proprietary Information” means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

“Licence” means the Customer’s right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

“Acceptance of Proposal” means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

“Fees” means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

“Processes” means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

“Proposal” means the specification of the Syndicated Research Report(s) by WI to the Customer

“Syndicated Research Report” means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

“Representative Organisation” means any body, association, trading group, generic organisation or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

“Subscription Products” means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, [XX] Dollars, Australian Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

2.. **Copyright**

2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI’s own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions

Connecting wine businesses with knowledge and insights globally

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