A division of the IWSR Group

Canada

Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

Canada continues to see a decline in the size of its wine-drinking population, losing just under 3 million monthly wine drinkers since 2022. There remains a big opportunity in sparkling wine

Canadian regular wine drinkers are reducing their frequency of consumption of wine, with significantly fewer drinking the beverage more than once a week. This change in behaviour has been noted in other mature markets as drinkers start to engage in alcohol moderation. Canada also has a smaller population which is drinking less wine than previously.

The decrease in frequency of consumption has already had an impact on volumes of wine sold in the Canadian market, with the category experiencing a decline of 1% between 2017 and 2022. However, the volume of still wine sold at premium-and-above prices has increased in the same period, which could suggest a trend towards less-but-better consumption by wine drinkers.

The exception to this trend is sparkling wine, which grew by 6.1% between 2017 and 2022, highlighting a potential opportunity presented by the category.

Canadian respondents are also consuming a narrower range of alcoholic beverages than in previous years, with white wine, beer and spirits categories all affected.

Purchase incidences for wine in the on-trade have still yet to recover to pre-pandemic levels. This is a result of respondents not buying wine in restaurant settings.

Opportunities

Growth of sparkling wine.
Higher typical spend on wine.
Growth of premium-and-above still wine.

Threats

Declining wine drinking population.
Lower volumes of wine sold.
Lower frequency of consumption.

Management Summary

Canada Wine Landscapes

2023

Management summary

Key takeaways

1. Canada's wine drinking population is in decline

2. Lower consumption among regular wine drinkers

3. Decreasing volumes of wine being sold in the Canadian market

4. Wine drinkers are consuming a narrower range of beverages

5. Purchase incidences of wine in the on-premise yet to bounce back

6. Evidence of down-trading in the wine category

1. Canadian's wine drinking population is in decline

The number of monthly wine drinkers in Canada has dropped by around 2 million drinkers since 2019. The category has also lost 2.7 million weekly wine drinkers

Decline in wine drinking population

Those who drink wine at least once a month

1 Wine Intelligence online calibration study, Sep'19, n=1,000 Canadian adults 19+ years. Wine=still light wine (red, white, rosé)
2 Wine Intelligence online calibration study, rolling average of May 2022 & April 2023, (n=2,020) Canadian adults 19+ years. Wine=still light wine (red, white, rosé)
3 Wine Intelligence, Vinitrac® Canada, Oct '19, Apr '23, (n=1,000) Canadian regular wine drinkers

2. Lower consumption among regular wine drinkers

The proportion of respondents drinking wine at the highest frequency has decreased significantly, with only 39% doing so more than once a week, compared to 47% in 2019. This development is in line with the trend of moderation seen in other mature wine markets. Not only are there fewer drinkers in the markets, but the smaller wine-drinking population is also consuming lower volumes of wine than before

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Canadian regular wine drinkers (n≥1,000)

	2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
Most days / every day	**11%**	**9%**	**8%**	⬇	➡
2-5 times a week	**36%**	**30%**	**31%**	⬇	➡
About once a week	**31%**	**33%**	**32%**	➡	➡
1-3 times a month	**22%**	**27%**	**29%**	⬆	➡

Market context:

Daytime and early evening drinking occasions have dwindled since the days of lockdown, hurting still wine volumes.

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⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

3. Decreasing volumes of wine being sold, mostly in the lower end

As the wine drinking population in Canada decreases and shows increasing signs of moderation, there has been a tangible effect on the volume of wine sold. However, volumes of still wine sold at premium-and-above prices have increased in recent years, suggesting a trend towards less-but-better

Market context:

The growth of spirits and the increasing popularity of making cocktails at home have impacted sales of still wine in the off-trade. The rise of craft breweries, distilleries and cideries has diverted attention from local winery visits and reduced engagement, especially among younger LDA consumers.

Executive Summary Report 2023 Canada

Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	50,716.20	47,972.80	-1.0%	-0.4%
Still Wine	46,285.90	43,764.80	-1.2%	-0.6%
Sparkling Wine	2,662.30	2,554.40	6.1%	4.3%
Other Wines*	1,041.60	983.70	-3.2%	-2.8%
Fortified Wine	405.00	364.20	-7.0%	-4.6%
Light Aperitifs	321.50	305.90	-0.8%	0.2%

Still wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under CAD 7.99)	4,824.70	4,474.15	-3.3%	-3.0%
Standard (between CAD 8.00 and 14.99)	26,422.50	24,417.35	-2.8%	-1.8%
Premium (between CAD 15.00 and 22.99)	13,550.45	13,340.62	2.5%	1.6%
Super Premium (between CAD 23.00 and 32.99)	1,267.75	1,308.35	3.3%	4.2%
Ultra Premium (between CAD 33.00 and 58.99)	193.50	199.50	3.1%	3.6%
Prestige (over CAD 59.00)	26.95	24.78	50.1%	2.4%

Source: IWSR

*Other Wines includes non-grape based wines

4. Wine drinkers are consuming a narrower range of beverages

Four of the top five leading alcohol categories among Canadian regular wine drinkers have significantly lower consumption incidences than in 2019. This points towards a growing trend of moderation among Canadian wine drinkers, who are engaging with a narrower range of alcoholic beverages than before

Alcoholic beverage repertoire, Top 15: Tracking

% who have drunk the following beverages in the past 12 months
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Red wine	85%	82%	83%	→	→
2	White wine	81%	76%	77%	↓	→
3	Beer	74%	68%	65%	↓	→
4	Vodka	49%	47%	42%	↓	↓
5=	Rum	43%	37%	37%	↓	→
5=	Rosé wine	39%	35%	37%	→	→
7	Whisky / Whiskey	41%	38%	36%	↓	→
8	Craft beer	40%	32%	33%	↓	→
9	Cocktails	28%	29%	30%	→	→
10	Pre-mixed / ready to drink alcoholic beverages	29%	29%	27%	→	→
11	Gin	26%	24%	26%	→	→
12	Liqueurs	30%	26%	24%	↓	→
13=	Champagne (French Champagne)	25%	21%	22%	→	→
13=	Prosecco	19%	20%	22%	→	→
13=	Cider	26%	21%	22%	↓	→

=Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

5. Purchase incidences of wine in the on-premise yet to bounce back

Wine purchases in restaurants have yet to return to pre-pandemic levels, in line with trends seen in other markets. This could be because more price-sensitive drinkers are staying away from the on-premise because of financial pressures

Wine purchase in on-premise

% who buy wine in a bar, pub or restaurant
Base = All Canadian regular wine drinkers (n≥1,000)

On-premise location		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
Bar or pub	Yes	41%	38%	38%	→	→
	No	59%	62%	62%	→	→
Restaurant	Yes	81%	74%	76%	↓	→
	No	19%	26%	24%	↑	→
On-premise drinkers	Yes	82%	76%	78%	↓	→
	No	18%	24%	22%	↑	→

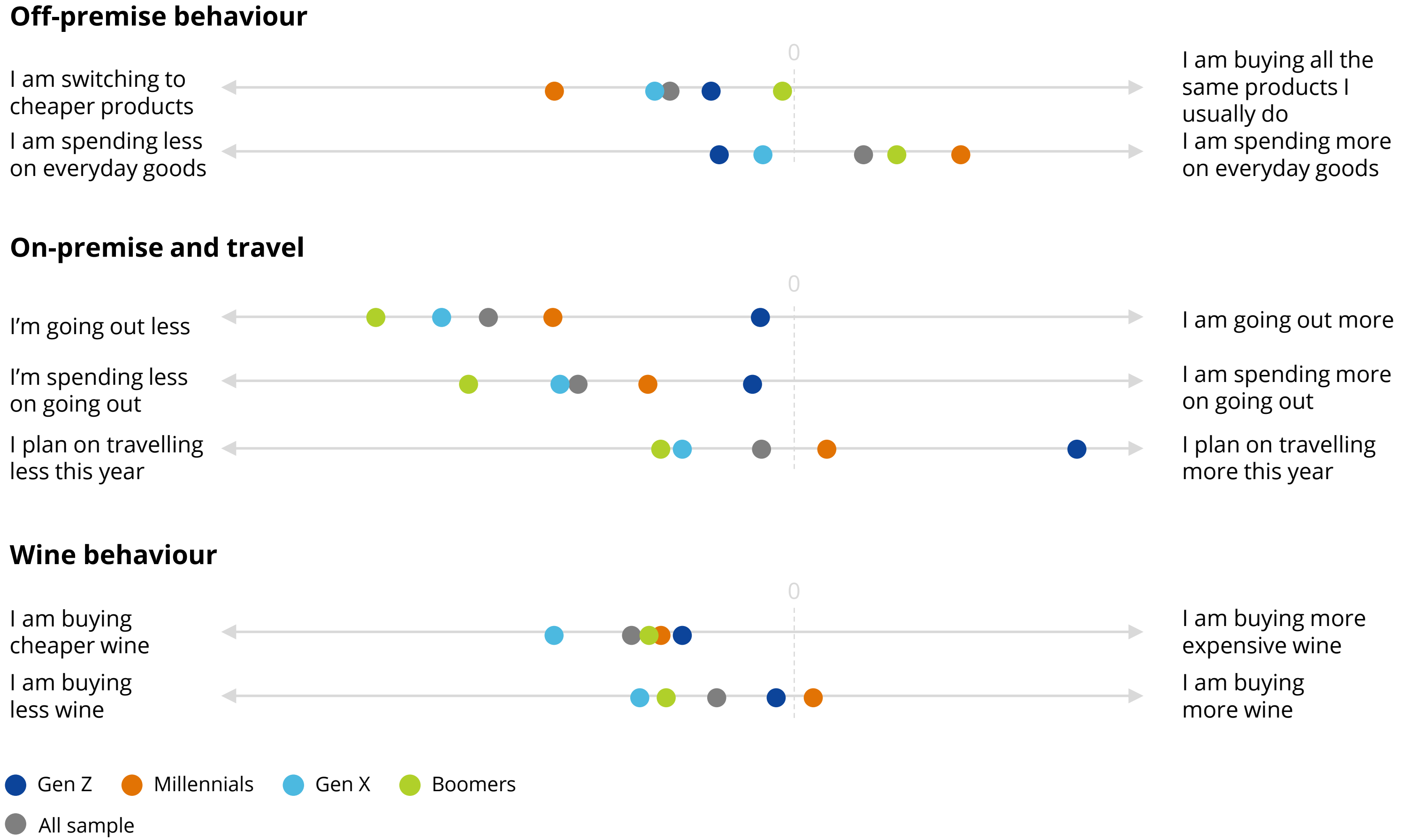
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

6. Evidence of down-trading in the wine category

Although there has been a significant increase in the spend levels of respondents over the past few years, there is now some evidence of down-trading. A majority in all age groups say they are buying cheaper wine than before, most notably in Gen X. Respondents across all age groups also suggest that they are going out less, although this attitude is much less common among Gen Z drinkers

Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -53%, Maximum value: 76%
Base = All Canadian regular wine drinkers (n=1,025)



Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Management summary: Tracking metrics

The range of alcoholic beverages consumed by Canadian regular wine drinkers has narrowed since 2022

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2019	2023	Tracking
Red wine	**85%**	**83%**	→
White wine	**81%**	**77%**	↓
Beer	**74%**	**65%**	↓
Vodka	**49%**	**42%**	↓
Rum	**43%**	**37%**	↓

Top country of origin

% who have drunk wine from the following places in the past six months

	2019	2023	Tracking
Canada	**62%**	**56%**	↓
California – USA	**44%**	**38%**	↓
Italy	**42%**	**37%**	↓
France	**42%**	**36%**	↓
Australia	**31%**	**26%**	↓

Top region of origin

% who have bought wine from the following regions in the past three months

	2019	2023	Tracking
Niagara Peninsula	**20%**	**20%**	→
Napa Valley	**23%**	**19%**	→
Bordeaux	**22%**	**19%**	→
Okanagan Valley	**20%**	**16%**	→
Tuscany	**12%**	**13%**	→

Top wine brands

% who have bought the following brands in the past three months

	2019	2023	Tracking
Yellow Tail	**25%**	**21%**	↓
Jackson-Triggs	**23%**	**18%**	↓
Jacob's Creek	**15%**	**17%**	→
Barefoot	**16%**	**14%**	→
Kim Crawford	**8%**	**9%**	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '23, (n≥1,000) Canadian regular wine drinkers

Management summary: Tracking metrics

Leading varietals have experienced lower levels of consumption among respondents

Top red varietals

% who have drunk the following varietals in the past six months

	2019	2023	Tracking
Cabernet Sauvignon	**51%**	**50%**	→
Merlot	**55%**	**48%**	↓
Pinot Noir	**47%**	**40%**	↓
Shiraz / Syrah	**37%**	**28%**	↓
Malbec	**23%**	**25%**	→

Top wine-shopping channels

% who have bought wine from the following channels in the past six months

	2019	2023	Tracking
In a government-controlled liquor store	**69%**	**67%**	→
In a grocery store	**23%**	**23%**	→
In a wine store attached to a grocery store	**21%**	**17%**	↓
In a privatized liquor store	**21%**	**16%**	↓
In a beer and wine	**14%**	**15%**	→

Top white varietals

% who have drunk the following varietals in the past six months

	2019	2023	Tracking
Pinot Grigio / Pinot Gris	**51%**	**48%**	→
Sauvignon Blanc	**52%**	**48%**	→
Chardonnay	**51%**	**47%**	→
Riesling	**32%**	**26%**	↓
Moscato	**21%**	**20%**	→

Wine choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine

	2020	2023	Tracking
A brand I am aware of	**69%**	**71%**	→
Grape variety	**74%**	**69%**	↓
The country of origin	**67%**	**64%**	→
Taste/wine descriptions on shelves/labels	**66%**	**63%**	→
Recommendation by friend or family	**66%**	**63%**	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '23, (n≥1,000) Canadian regular wine drinkers

Market Data

Canada Wine Landscapes

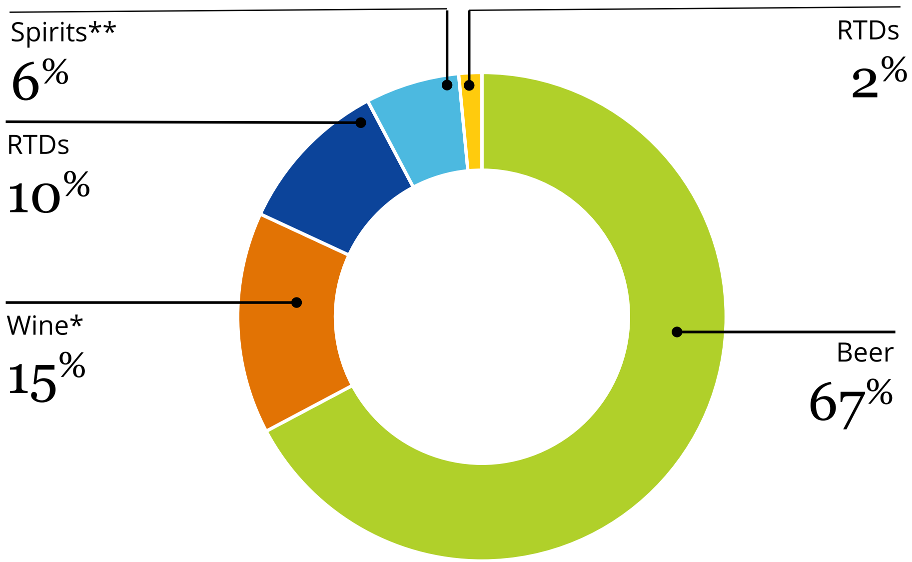
2023

Total beverage alcohol market share by category

Wine is the second largest alcohol category in Canada, with 15% market share; wine and the leading category beer both saw volume declines between 2017 and 2022

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	338,211.80	327,014.70	0.3%	-0.6%
Beer	227,327.80	219,880.30	-1.4%	-1.5%
Wine*	50,716.10	47,972.80	-1.0%	-0.4%
RTDs	34,541.30	33,812.80	22.0%	3.8%
Spirit**	20,307.20	20,366.40	2.2%	1.3%
Cider	5,319.40	4,982.60	-0.9%	-1.1%

Source: IWSR

* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

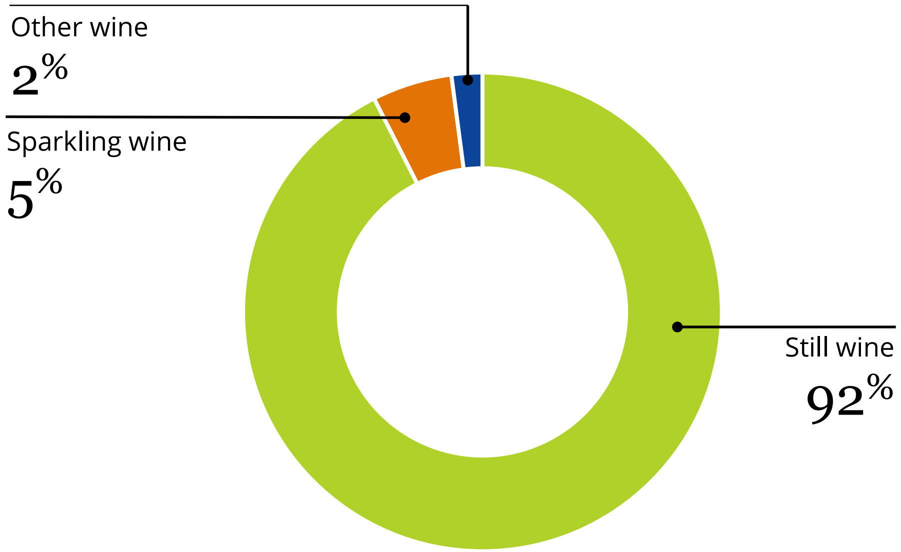
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Total wine market volumes

Still wine has over 90% of the total volume of wine sold in Canada, although it declined between 2017 and 2022; sparkling wine was the only sub-category to grow volumes in that period

Total wine share by category*

% of purchases that fall within the categories below



Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	50,716.20	47,972.80	-1.0%	-0.4%
Still Wine	46,285.90	43,764.80	-1.2%	-0.6%
Sparkling Wine	2,662.30	2,554.40	6.1%	4.3%
Other Wines**	1,041.60	983.70	-3.2%	-2.8%
Fortified Wine	405.00	364.20	-7.0%	-4.6%
Light Aperitifs	321.50	305.90	-0.8%	0.2%

Market context:

Still wine posted another year of substantial volume losses, erasing all gains observed during 2020's pandemic-related surge in consumption, falling to a low for recent years. However, Canada has posted among the highest CAGRs for sparkling wine in recent years as demand grows.

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Source: IWSR

*Fortified Wine and Light Aperitifs omitted from pie chart due to low percentage value

**Other Wines includes non-grape based wines

Still wine volumes by origin

Domestically produced wine has the largest share of the market in Canada; of the leading countries of origin, only France, Spain and Portugal experienced volume growth between 2017 and 2022

Total still wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	46,285.85	43,764.75	-1.2%	-0.6%	
1	Canadian	13,559.50	12,940.85	-0.7%	-1.2%	30%
2	Italian	6,600.35	6,330.20	-1.8%	-0.9%	14%
3	US	5,862.35	5,583.30	-1.7%	-0.5%	13%
4	French	5,377.15	5,003.65	2.0%	1.1%	11%
5	Australian	4,533.30	4,271.35	-2.3%	-1.6%	10%
6	Chilean	2,581.55	2,370.75	-3.9%	-1.2%	5%
7	Spanish	2,493.85	2,284.85	1.4%	1.0%	5%
8	Argentinian	1,577.75	1,460.85	-5.5%	-3.5%	3%
9	New Zealand	1,367.20	1,340.20	-0.2%	1.0%	3%
10	Portuguese	898.70	835.20	2.1%	2.2%	2%

Source: IWSR

Still wine retail price by origin

All countries of origin experienced a rise in price points in the Canadian market, with this forecast to continue for all except Portugal

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a fixed exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	10.16	2.4%	0.6%
1	Canadian	8.57	2.1%	0.2%
2	Italian	10.63	2.5%	0.9%
3	US	12.13	2.9%	1.0%
4	French	11.28	2.2%	0.3%
5	Australian	9.52	0.8%	0.5%
6	Chilean	9.31	3.9%	0.9%
7	Spanish	10.35	3.2%	0.6%
8	Argentinian	9.52	2.7%	0.2%
9	New Zealand	15.41	2.0%	0.1%
10	Portuguese	9.55	2.9%	-0.5%

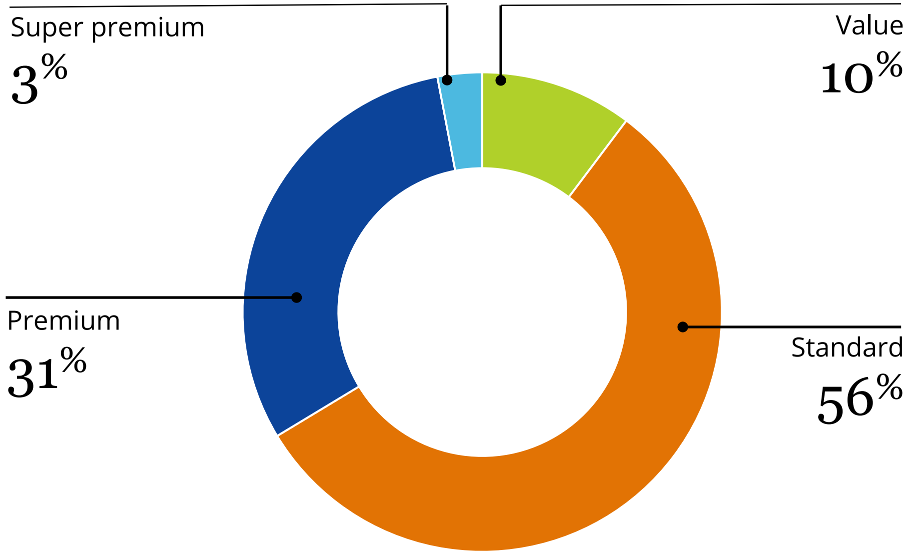
Source: IWSR

Still wine by price band

Still wine in Canada is showing signs of premiumisation, with premium-and-above price bands growing, especially prestige price points; standard-and-below declined, though standard is still the largest segment

Still wine by price band*

% of purchases that fall within the categories below



Still wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under CAD 7.99)	4,824.70	4,474.15	-3.3%	-3.0%
Standard (between CAD 8.00 and 14.99)	26,422.50	24,417.35	-2.8%	-1.8%
Premium (between CAD 15.00 and 22.99)	13,550.45	13,340.62	2.5%	1.6%
Super Premium (between CAD 23.00 and 32.99)	1,267.75	1,308.35	3.3%	4.2%
Ultra Premium (between CAD 33.00 and 58.99)	193.50	199.50	3.1%	3.6%
Prestige (over CAD 59.00)	26.95	24.78	50.1%	2.4%

* Ultra premium and prestige omitted from pie chart due to low percentage value

Source: IWSR

Still wine consumption per capita

Canada is a top 50 market for per capita consumption of still wine. Its declining per capita consumption mirrors that experienced by many top 20 countries

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.7	49.0	12.3%	5.0%
2	Portugal	43.0	45.7	-0.9%	6.3%
3	Montenegro	41.8	42.6	-0.9%	2.0%
4	Italy	42.2	39.9	-2.8%	-5.2%
5	Slovenia	37.6	37.8	-2.8%	0.5%
6	St. Barths	33.9	37.2	9.3%	9.8%
7	Switzerland	36.1	34.9	-1.5%	-3.3%
8	France	35.7	33.9	-5.2%	-5.0%
9	Greece	28.0	33.8	0.5%	20.9%
10	Hungary	31.5	32.7	0.6%	3.6%
11	Denmark	33.4	31.0	-1.2%	-7.1%
12=	Austria	30.9	30.1	-1.3%	-2.6%
12=	Turks and Caicos	27.6	30.1	-2.9%	9.2%
14=	Romania	27.5	27.9	2.4%	1.2%
14=	US Virgin Islands	27.8	27.9	-2.6%	0.3%
16	Germany	26.5	25.3	-2.5%	-4.8%
17	Argentina	25.3	24.9	-2.7%	-1.5%
18	Malta	21.2	24.3	-6.4%	14.9%
19=	Uruguay	25.6	23.4	-1.3%	-8.6%
19=	Slovakia	22.9	23.4	-0.1%	1.9%
43	Canada	13.6	12.7	-2.1%	-6.2%

Source: IWSR

Sparkling wine volumes by origin

All countries of origin saw increases in volumes sold between 2017 and 2022; Italian sparkling is the market leader, followed by domestically produced wine, then France and Spain

Total sparkling wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	2,662.25	2,554.35	6.1%	4.3%	
1	Italian	1,004.90	1,031.80	11.1%	7.1%	40%
2	Canadian	463.00	397.40	4.8%	3.0%	16%
3	French	400.85	389.35	5.7%	2.3%	15%
4	Spanish	267.50	250.65	3.3%	3.4%	10%
5	Australian	198.75	178.00	0.6%	2.1%	7%
6	German	150.85	149.50	4.0%	0.6%	6%
7	US	76.75	65.00	-3.7%	-1.9%	3%
8	Hungarian	53.00	62.50	4.3%	1.0%	2%
9	Chilean	27.40	11.75	6.1%	-0.6%	0%
10	South African	7.25	6.00	3.7%	6.4%	0%

Source: IWSR

Sparkling wine retail price by origin

All countries of origin except for Chile experienced a rise in price points in the Canadian market

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a fixed exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	16.40	2.7%	0.0%
1	Italian	13.14	2.5%	0.1%
2	Canadian	10.19	6.7%	4.1%
3	French	38.68	2.0%	-0.2%
4	Spanish	12.39	2.8%	0.3%
5	Australian	11.47	1.1%	0.1%
6	German	12.15	2.4%	0.0%
7	US	20.16	6.2%	0.6%
8	Hungarian	10.76	3.2%	0.0%
9	Chilean	8.46	-4.0%	0.7%
10	South African	9.41	0.5%	0.0%

Market context:

Within 'other', Italian sparkling wine, led by Prosecco, is responsible for most growth.

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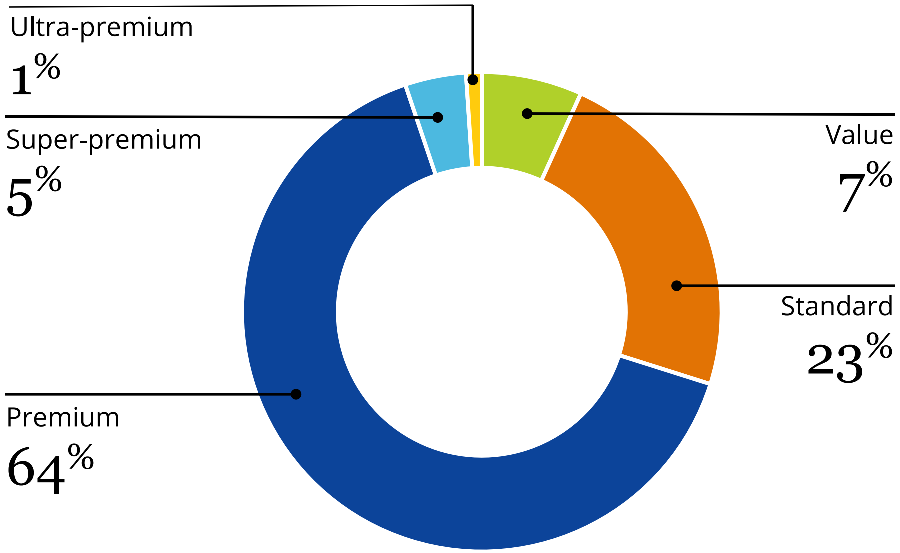
Source: IWSR

Sparkling wine by price band

The bulk of sparkling wine in Canada is sold at premium price points; all price bands except for standard saw increases in volumes

Sparkling wine by price brand*

% of purchases that fall within the categories below



Sparkling wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under CAD 7.99)	168.10	156.50	7.9%	-2.0%
Standard (between CAD 8.00 and 14.99)	640.25	532.95	-1.4%	-0.8%
Premium (between CAD 15.00 and 22.99)	1,479.70	1,498.65	9.0%	6.3%
Super Premium (between CAD 23.00 and 32.99)	94.00	94.95	9.3%	11.9%
Ultra Premium (over CAD 33.00)	27.20	24.45	15.8%	-0.3%

Note: Sparkling wine includes no- and low-sparkling wine but excludes Champagne

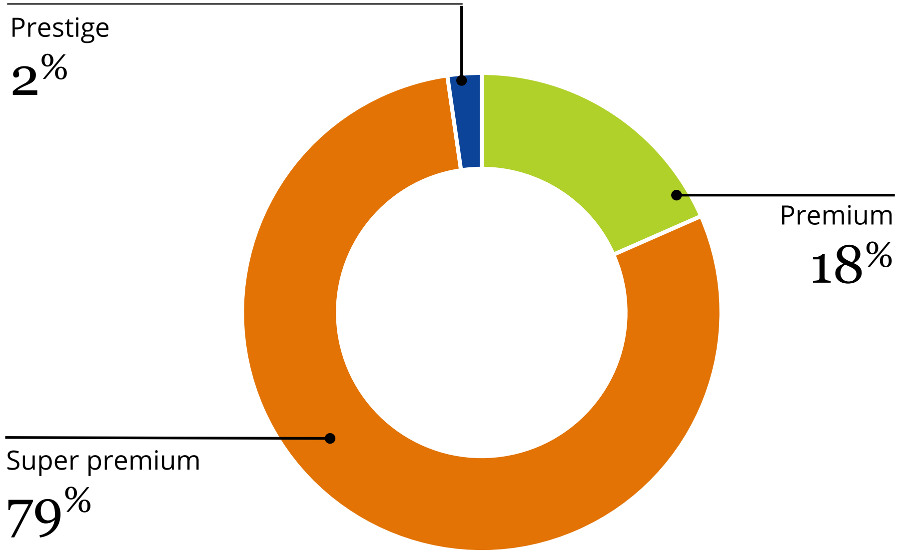
Source: IWSR

Champagne by price band

Most Champagne in the Canadian market is sold at super-premium price points

Champagne by price brand*

% of purchases that fall within the categories below



Champagne volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Premium (under CAD 60.00)	42.30	42.10	7.9%	3.4%
Super Premium (between CAD 60.00 and 199.99)	188.10	181.30	5.9%	1.9%
Prestige (between CAD 200.00 and 349.99)	6.00	5.25	2.0%	2.2%
Prestige Plus (over CAD 350.00)	0.10	0.20	5.9%	7.7%

Market context:

Champagne lagged behind non-Champagne growth until pandemic-era volume increases. Champagne had not enjoyed high growth until relatively recently.

Executive Summary Report 2023 Canada

*Prestige-plus omitted from pie chart due to low percentage value

Source: IWSR

Sparkling wine consumption per capita

Canada falls just outside the top 50 markets for per capita consumption of sparkling wine, even though the market experienced an increase in per capita levels between 2017 and 2022

Market context:

Given sparkling wine's relatively low market share in Canada and recent growth, the category holds great potential, particularly from premium-and-above brands.

Executive Summary Report 2023 Canada

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.5	13.6	13.1%	8.9%
2	St. Martin and St. Maarten	6.3	8.3	21.7%	32.6%
3	Italy	7.9	7.4	-1.2%	-6.2%
4	Turks and Caicos	5.3	6.5	-2.4%	23.4%
5	Germany	5.3	5.5	-1.9%	3.7%
6	Lithuania	4.9	5.1	7.3%	3.6%
7=	Latvia	4.5	4.9	2.6%	9.4%
7=	France	4.7	4.9	-1.3%	2.7%
9	Guadeloupe	4.2	4.8	-1.8%	15.5%
10	Martinique	4.2	4.4	-4.6%	4.8%
11=	Estonia	4.1	4.3	4.0%	6.3%
11=	Belgium and Luxembourg	4.3	4.3	-1.5%	-0.2%
13	Austria	3.4	3.5	0.3%	2.9%
14=	Switzerland	3.2	3.3	0.9%	3.0%
14=	Cayman Islands	3.1	3.3	2.1%	5.8%
14=	Sweden	3.3	3.3	6.7%	0.6%
17=	United Kingdom	3.2	3.0	-0.6%	-4.8%
17=	Slovenia	2.9	3.0	3.0%	4.1%
19=	New Zealand	3.1	2.9	-1.6%	-6.1%
19=	Reunion	2.6	2.9	0.7%	14.7%
55=	Canada	0.8	0.7	5.2%	-4.8%

Source: IWSR

Market Demographics

Canada Wine Landscapes

2023

Canadian regular wine drinkers

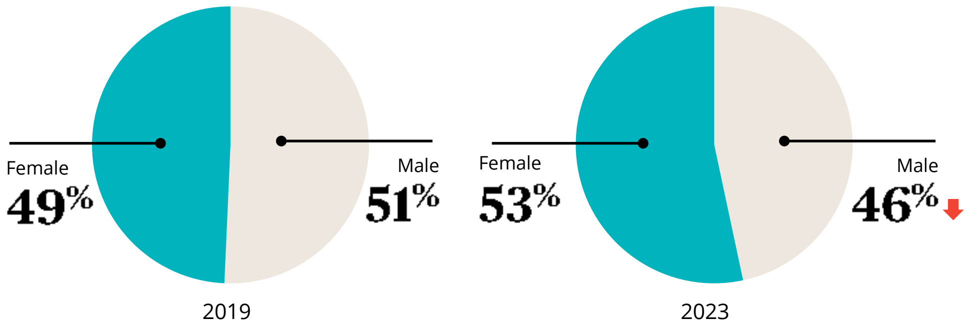
The regular wine drinking population in Canada fell by around 2 million between 2019 and 2023

1 Statistics Canada 2018 estimates
2 Statistics Canada 2021 Census
3 Wine Intelligence online calibration study, Sep'19, n=1,000 Canadian adults 19+ years. Wine=still light wine (red, white, rosé)
4 Wine Intelligence online calibration study, rolling average of May 2022 & April 2023, (n=2,020) Canadian adults 19+ years. Wine=still light wine (red, white, rosé)
5 Wine Intelligence, Vinitrac® Canada, Oct '19, Apr '23, (n=1,000) Canadian regular wine drinkers

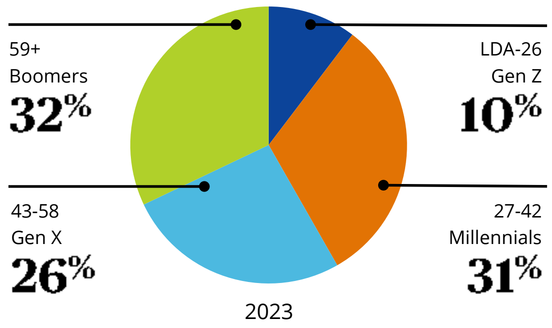
Demographics of Canadian RWDs

The gender balance of Canadian regular wine drinkers has seen a decline in the proportion of men; just under 60% of all monthly wine drinkers are aged 43 or over

Gender



Generation cohorts



Canadian provinces

	2019	2023	Tracking
Québec	25%	28%	➡
Ontario	38%	39%	➡
West	31%	28%	➡
Other Provinces	5%	5%	➡

Annual household income before tax

	2019	2023	Tracking
Under $20,000	4%	5%	➡
$20,000 - $39,999	11%	13%	➡
$40,000 - $59,999	20%	17%	➡
$60,000 - $79,999	18%	16%	➡
$80,000 - $99,999	15%	13%	➡
$100,000 - $119,999	11%	12%	➡
$120,000+	18%	19%	➡
Prefer not to answer	4%	5%	➡

Portraits

	2019	2023	Tracking
Engaged Explorers	9%	9%	➡
Generation Treaters	8%	8%	➡
Mainstream Matures	21%	17%	⬇
Social Newbies	24%	24%	➡
Contented Occasionals	14%	16%	➡
Kitchen Casuals	24%	26%	➡

Note: tracking not available for generation cohorts due to change in data collection

RWD: Regular wine drinkers

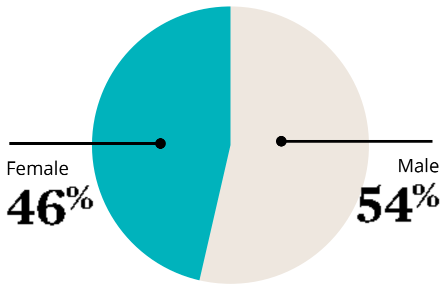
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

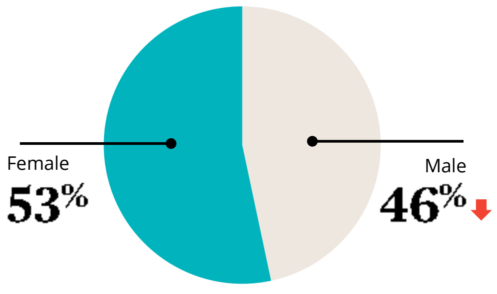
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '23, (n≥1,000) Canadian regular wine drinkers

Demographic: French speakers

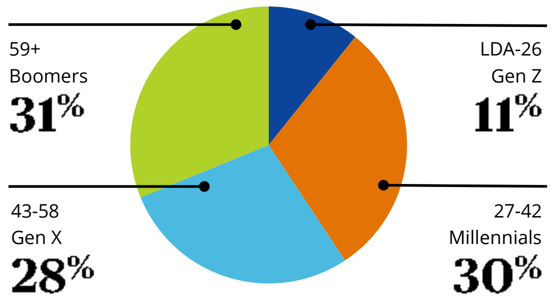
There has a swing in the gender balance of French-speaking regular wine drinkers, with a greater proportion now women

Gender





Generation cohorts



Canadian provinces

	2019	2023	Tracking
Québec	100%	100%	➡

Annual household income before tax

	2019	2023	Tracking
Under $20,000	8%	6%	➡
$20,000 - $39,999	11%	16%	➡
$40,000 - $59,999	22%	18%	➡
$60,000 - $79,999	19%	17%	➡
$80,000 - $99,999	12%	13%	➡
$100,000 - $119,999	12%	10%	➡
$120,000+	14%	15%	➡
Prefer not to answer	3%	5%	➡

Portraits

	2019	2023	Tracking
Engaged Explorers	11%	8%	➡
Generation Treaters	6%	10%	➡
Mainstream Matures	18%	16%	➡
Social Newbies	32%	24%	⬇
Contented Occasionals	10%	17%	⬆
Kitchen Casuals	22%	25%	➡

Note: tracking not available for generation cohorts due to change in data collection

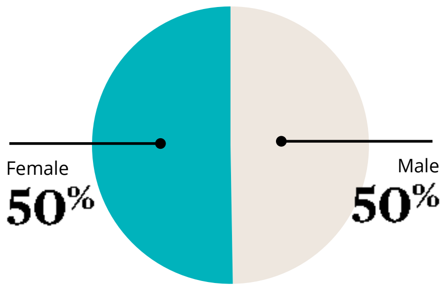
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '23, (n≥1,000) Canadian regular wine drinkers

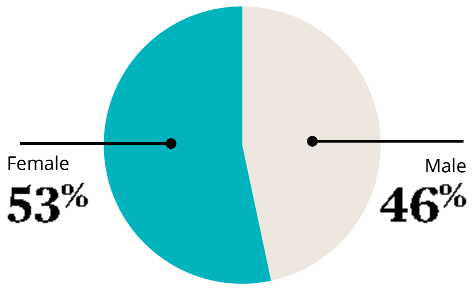
Demographic: English speakers

Apart from their provincial distribution, the demographic make-up of English-speaking Canada broadly aligns with regular wine drinkers overall

Gender

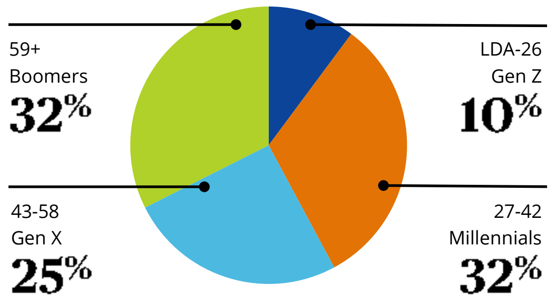


2019



2023

Generation cohorts



2023

Canadian provinces

	2019	2023	Tracking
Ontario	51%	54%	→
West	42%	39%	→
Other Provinces	7%	7%	→

Annual household income before tax

	2019	2023	Tracking
Under $20,000	3%	4%	→
$20,000 - $39,999	11%	13%	→
$40,000 - $59,999	19%	16%	→
$60,000 - $79,999	17%	16%	→
$80,000 - $99,999	15%	13%	→
$100,000 - $119,999	10%	12%	→
$120,000+	19%	20%	→
Prefer not to answer	5%	5%	→

Portraits

	2019	2023	Tracking
Engaged Explorers	8%	10%	→
Generation Treaters	9%	8%	→
Mainstream Matures	23%	18%	↓
Social Newbies	21%	24%	→
Contented Occasionals	15%	15%	→
Kitchen Casuals	24%	26%	→

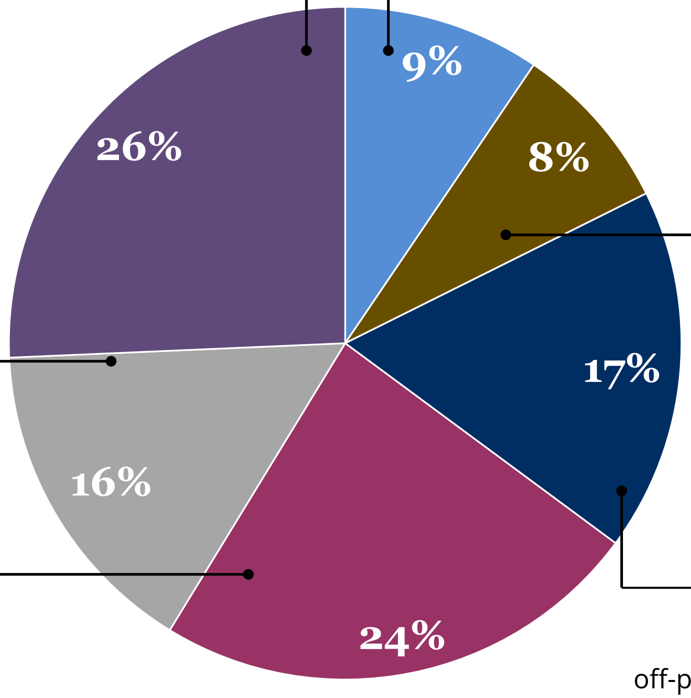
Note: tracking not available for generation cohorts due to change in data collection

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '23, (n≥1,000) Canadian regular wine drinkers

HOT TOPIC

Canada Portraits: Wine drinker segmentation

Percentage share of Canada regular wine drinkers by Portraits segments 2023



KITCHEN CASUALS
The oldest segment and the lowest earners. Infrequent drinkers, sticking to a narrow range of wines that they know. Show little interest in wine, drinking it as a treat at the end of the day, though not regularly. Mostly buy from government-controlled liquor stores, and the least likely segment to use alternative channels or shop online. Virtually no on-premise drinking. Stick to known, mainstream, lower-priced brands when selecting wine.

ENGAGED EXPLORERS
Middle-aged, confident and knowledgeable wine drinkers, and with significantly higher incomes. Willing to buy more wine and spend more. Wine is a key part of their lifestyle, drunk socially with friends but also on everyday occasions in the off-premise. Preference for wine-attached grocery stores and privatized liquor stores. Have the broadest wine and alcohol repertoires, and a wider range of regional consumption.

GENERATION TREATERS
Millennials who are frequent social drinkers, and the most outgoing in the on-premise, favouring parties and celebrations. Lack knowledge and are cautiously exploring the wine category, but willing to buy more wine and spend more. Wine helps elevate social occasions, and they stress more importance on recommendations, awards and medals. They have retreated from government-controlled liquor stores and prefer private wine stores. Most likely group to buy wine online.

CONTENTED OCCASIONALS
The second oldest segment and closest to the average consumer. They have good knowledge due to time spent in the category but are the least involved segment, drinking on a monthly basis. They stick to a narrow repertoire of mainstream, lower-priced brands. Most likely segment to stick to what they know.

SOCIAL NEWBIES
The youngest segment, comprised of Gen Z and younger Millennials, who are inexperienced in the category. They have low knowledge and confidence. They drink to share experiences with others and feel more sophisticated, especially when eating out. Overall, they are less frequent drinkers and average spenders. They rely on external sources of information such as getting recommendations for food pairings when out. Label appeal also plays an important part in their purchase behaviour.

MAINSTREAM MATURE
Older segment who are very confident and knowledgeable. Big off-premise shoppers for relaxed and informal occasions, but when they do stray into more formal occasions, they are willing to spend more, though with a lower spend per bottle. They use wine to unwind at the end of the day and to enhance food. Regions, countries and grape varieties are all important to them. Have a high awareness of mainstream wine brands and a preference for New World wines.

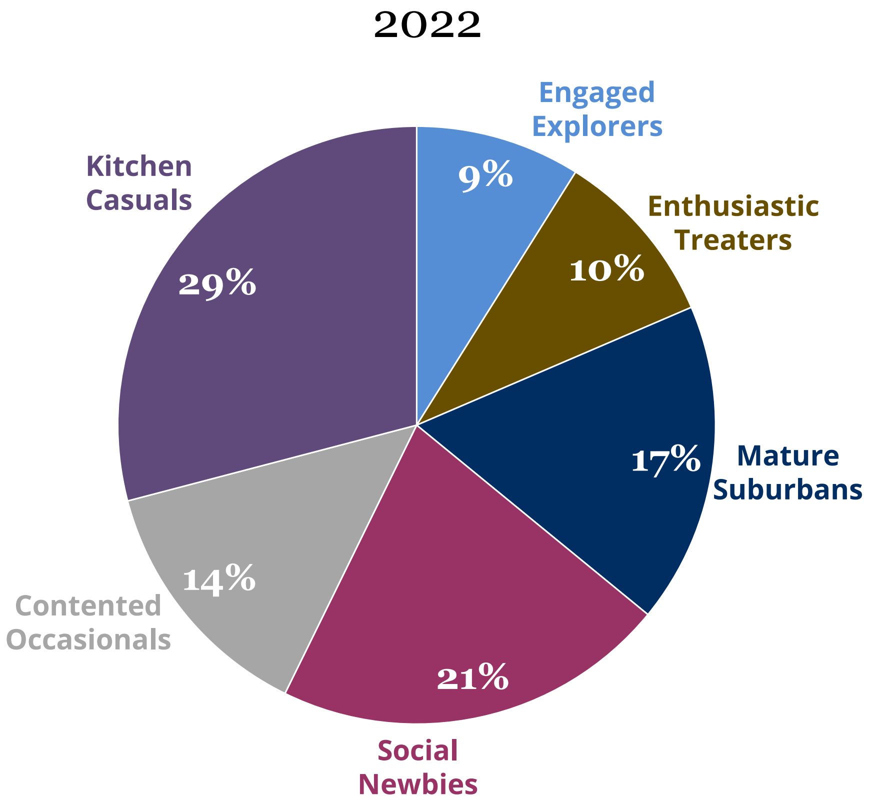
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

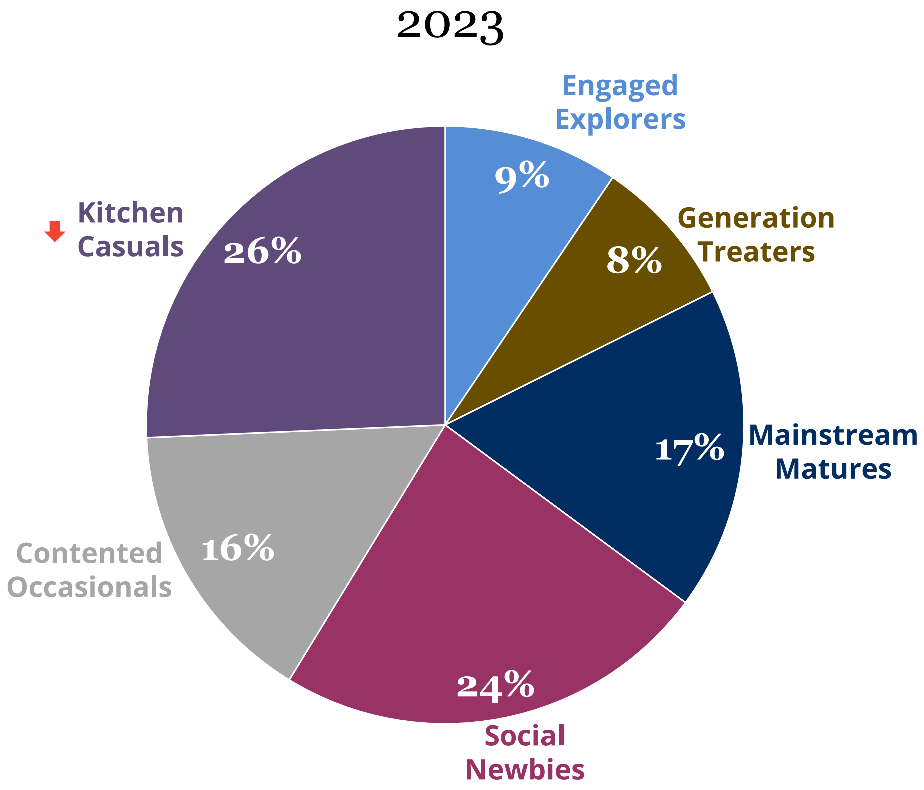
HOT TOPIC

Canada Portraits: Wine drinker segmentation

There has been a significant decrease in the proportion of wine drinkers classified as Kitchen Casuals

% share of population of Canada regular wine drinkers by Portraits segments 2022 vs 2023





⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Canada, Apr '22, Apr '23, (n≥1,025) Canadian regular wine drinkers

HOT TOPIC

Canada Portraits: Wine drinker segmentation

Changes to Canada Portraits segments between 2022 and 2023

Engaged Explorers → Engaged Explorers

Engaged Explorers remain similar to 2022, making up around 1 in 10 regular wine drinkers in Canada. They are still the highest spending segment and are the most adventurous segment. They remain mostly middle-aged, confident and knowledgeable wine drinkers. For these drinkers, wine is an important aspect of their lifestyle and typically they drink socially with friends and for everyday drinking

Enthusiastic Treaters → Generation Treaters

Enthusiastic Treaters have changed since 2022, with the Portrait grouping now no longer being the most adventurous or the highest spending in Canada. They are the highest consuming Portrait by some distance and are also mainly made up of Millennials that have low knowledge but high confidence

Mature Suburbans → Mainstream Matures

Mainstream Matures are the second oldest Portrait grouping in Canada who are big off-premise drinkers, especially at relaxed and informal occasions as they use the beverage as a way to unwind at the end of the day. Adding to this pairing wine with food and meals also continues to remain important for them

HOT TOPIC

Canada Portraits: Wine drinker segmentation

Changes to Canada Portraits segments between 2022 and 2023

Social Newbies → Social Newbies

Social Newbies remain the youngest Portrait segment, with them mostly being made up of Gen Z and Millennials. They tend to be inexperienced with the category and therefore have low knowledge and confidence. As a result of this, they place greater emphasis on external sources for information such as recommendations

Contented Occasionals → Contented Occasionals

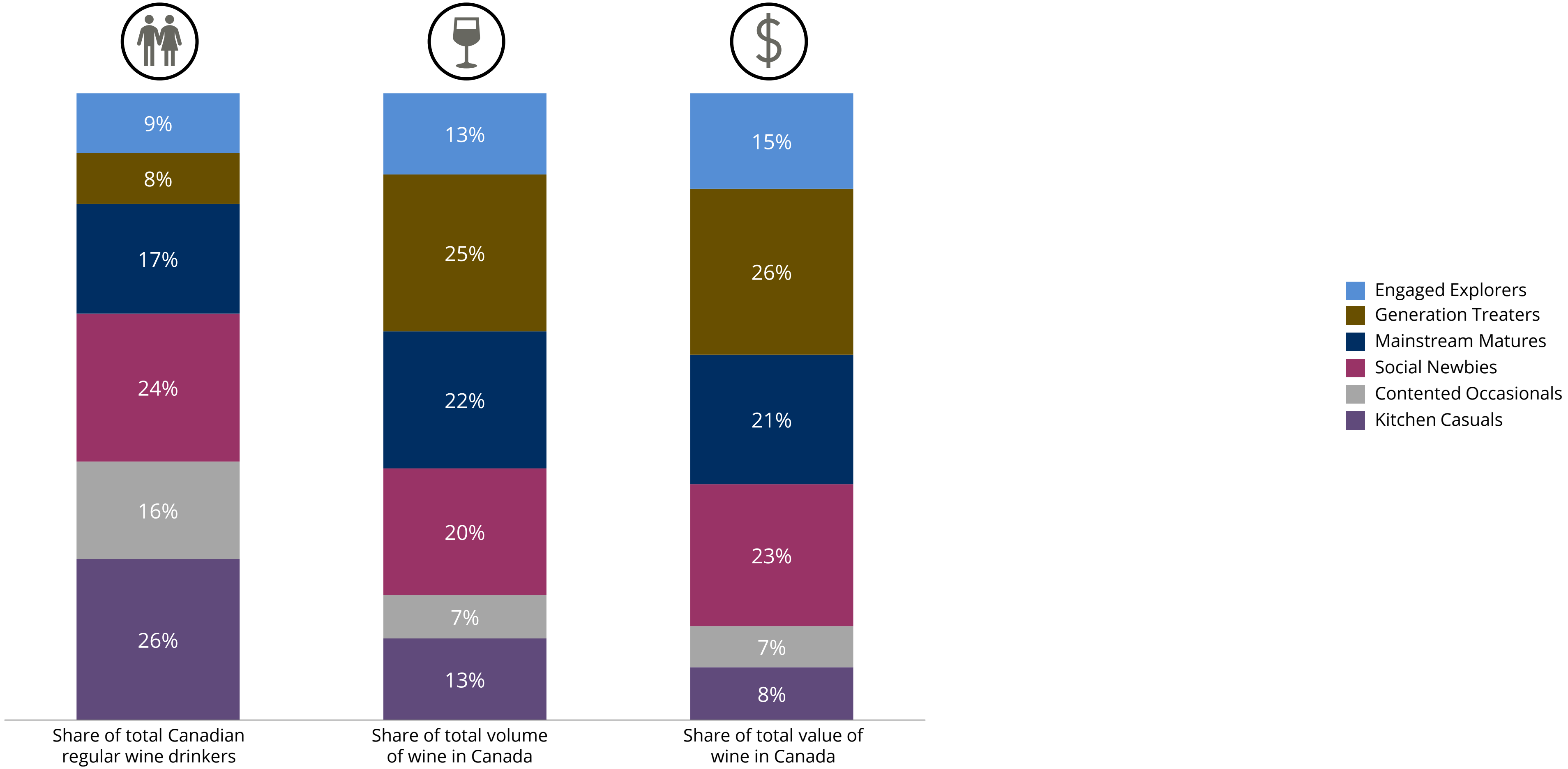
Contented Occasionals are no longer one of the oldest Portrait segments in the market, with them being the most reflective of the general wine market in terms of demographics. They still have good knowledge due to time spent in the category but are the least involved segment drinking monthly

Kitchen Casuals → Kitchen Casuals

Kitchen Casuals are still the oldest segment within Canada and continue to only drink wine off-premise. They still are the lowest income earners that also infrequent drinkers, sticking to a narrow range of wines they know

Canada Portraits market sizing

Though they only comprise 8% of the total wine drinking population in Canada, Generation Treaters account for around a quarter of the category's volume and value

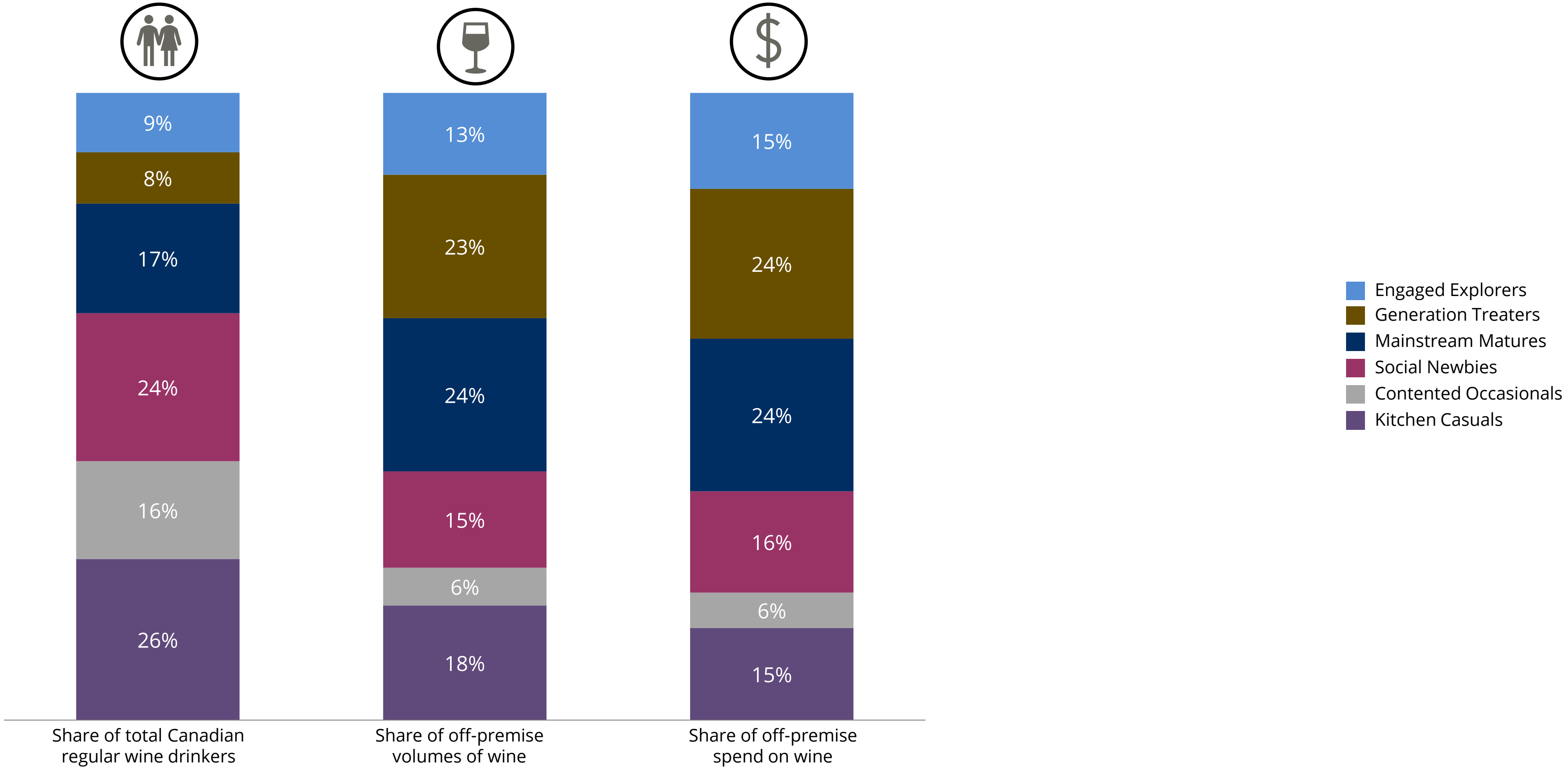


Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

HOT TOPIC

Canada Portraits market sizing: Off-premise

Mainstream Matures and Generation Treaters account for the largest proportion of volume and value in the off-premise; this is despite Generation Treaters being the smallest segment

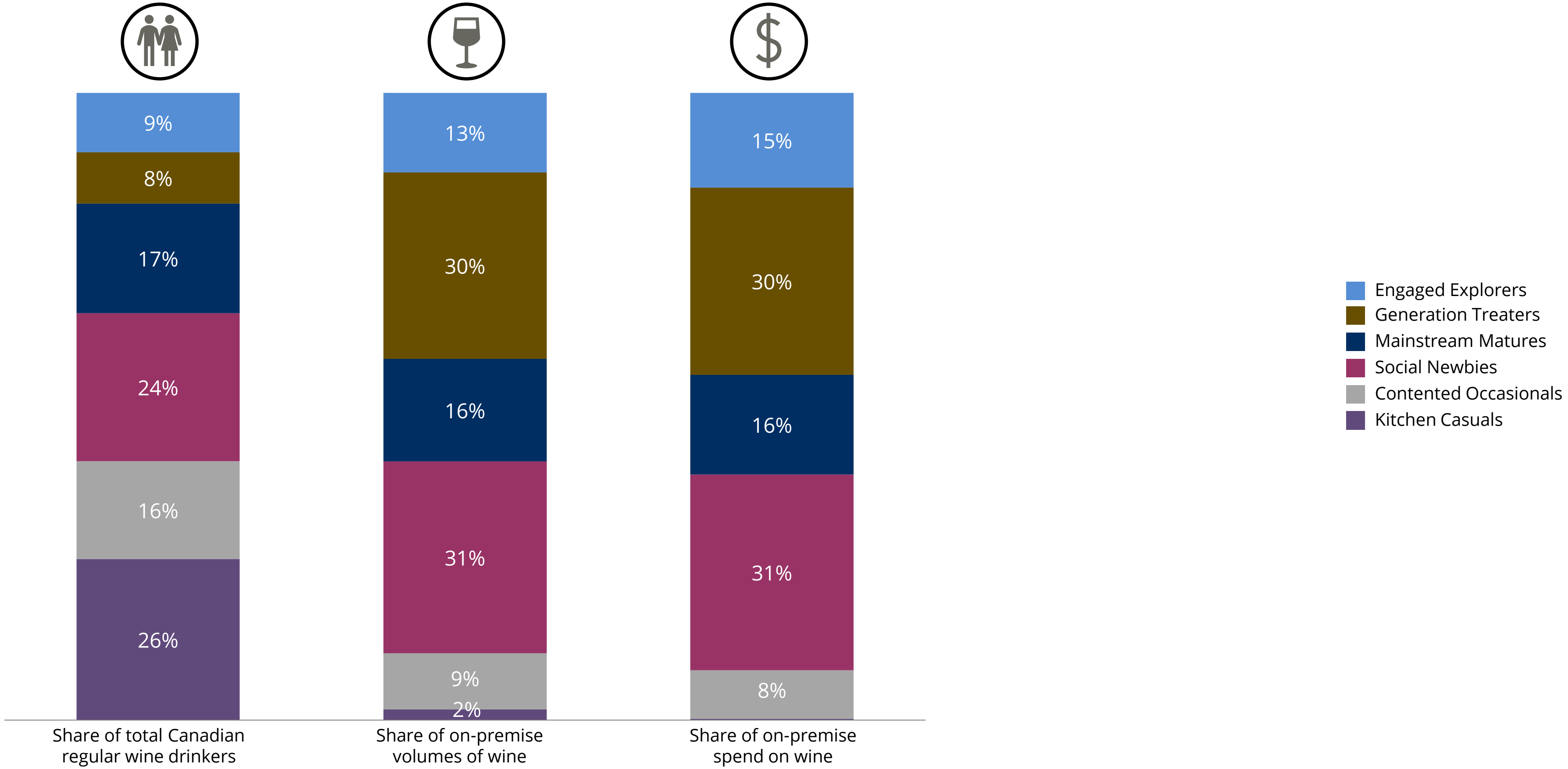


Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

HOT TOPIC

Canada Portraits market sizing: On-premise

Social Newbies account for a much larger proportion of volume and value in the on-premise than in the off-premise, highlighting the importance of the channel to this Portraits segment



Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Drinking Repertoire

Canada Wine Landscapes

2023

Drinking repertoire (1/2)

In line with global trends, beverage repertoires of Canadian regular wine drinkers have shrunk from previous years. Consumption incidence has declined for white wine since 2019, and beer, vodka and rum experienced the steepest declines. There has been more stability over the past year

Alcoholic beverage repertoire, Top 15: Tracking

% who have drunk the following beverages in the past 12 months
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Red wine	85%	82%	83%	→	→
2	White wine	81%	76%	77%	↓	→
3	Beer	74%	68%	65%	↓	→
4	Vodka	49%	47%	42%	↓	↓
5=	Rum	43%	37%	37%	↓	→
5=	Rosé wine	39%	35%	37%	→	→
7	Whisky / Whiskey	41%	38%	36%	↓	→
8	Craft beer	40%	32%	33%	↓	→
9	Cocktails	28%	29%	30%	→	→
10	Pre-mixed / ready to drink alcoholic beverages	29%	29%	27%	→	→
11	Gin	26%	24%	26%	→	→
12	Liqueurs	30%	26%	24%	↓	→
13=	Champagne (French Champagne)	25%	21%	22%	→	→
13=	Prosecco	19%	20%	22%	→	→
13=	Cider	26%	21%	22%	↓	→

=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Drinking repertoire (2/2)

French-speaking Canadians have higher consumption than all Canadian regular wine drinkers of both rosé wine and gin. The repertoires of English speakers match those of all wine drinkers

Alcoholic beverage repertoire, Top 15: by language spoken

% who have drunk the following beverages in the past 12 months
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	English-speaking Canada (n=742)	French-speaking Canada (n=283)
1	Red wine	83%	81%	87%
2	White wine	77%	77%	76%
3	Beer	65%	64%	68%
4	Vodka	42%	43%	39%
5=	Rum	37%	37%	38%
5=	Rosé wine	37%	33%	46%
7	Whisky / Whiskey	36%	40%	25%
8	Craft beer	33%	32%	34%
9	Cocktails	30%	29%	33%
10	Pre-mixed / ready to drink alcoholic beverages	27%	28%	27%
11	Gin	26%	24%	33%
12	Liqueurs	24%	25%	22%
13=	Champagne (French Champagne)	22%	23%	20%
13=	Prosecco	22%	23%	18%
13=	Cider	22%	24%	15%

=Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Varietal consumption

Several leading red varietals have seen long-term declines in consumption, but there has been a short-term increase for Pinot Grigio

White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1=	Pinot Grigio / Pinot Gris	51%	43%	48%	→	↑
1=	Sauvignon Blanc	52%	47%	48%	→	→
3	Chardonnay	51%	46%	47%	→	→
4	Riesling	32%	25%	26%	↓	→
5	Moscato	21%	19%	20%	→	→
6	White blend	21%	18%	19%	→	→
7	Chenin Blanc	9%	11%	11%	→	→
8	Gewürztraminer	11%	11%	10%	→	→
9	Viognier	4%	7%	6%	↑	→
10=	Sémillon	6%	7%	5%	→	→
10=	Verdejo	5%	5%	5%	→	→
12	Albariño	3%	5%	4%	→	→
13=	Grüner Veltliner	3%	5%	3%	→	→
13=	Torrontés	3%	5%	3%	→	↓
13=	Colombard	3%	4%	3%	→	↓
	Other	2%	2%	2%	→	→

Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Cabernet Sauvignon	51%	50%	50%	→	→
2	Merlot	55%	50%	48%	↓	→
3	Pinot Noir	47%	41%	40%	↓	→
4	Shiraz / Syrah	37%	30%	28%	↓	→
5	Malbec	23%	25%	25%	→	→
6	Red blend	23%	21%	22%	→	→
7	Zinfandel	18%	17%	16%	→	→
8	Cabernet Franc	15%	14%	14%	→	→
9	Sangiovese	12%	12%	10%	→	→
10	Tempranillo	8%	9%	9%	→	→
11=	Baco Noir	9%	9%	8%	→	→
11=	Grenache	8%	9%	8%	→	→
13=	Pinotage	6%	7%	6%	→	→
13=	Gamay	5%	6%	6%	→	→
15	Garnacha	4%	6%	5%	→	→
16	Carménère	6%	6%	4%	→	→
	Other	3%	2%	3%	→	→

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

HOT TOPIC

Ideal wine attributes

Respondents' ideal wine attributes for both red and white have broadly held since 2022, though fewer now say their ideal white wine would be smooth or that red wine should be fruity

Ideal white wine attributes: Top 15

% who select each description for their ideal white wine
Base = All Canadian regular wine drinkers (n≥1,025)

Ranking '23		2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '22
1	Easy to drink	38%	39%	→
2	Fresh	37%	37%	→
3	Fruity	36%	36%	→
4	Light	34%	34%	→
5	Smooth	39%	33%	↓
6	Crisp	26%	28%	→
7	Dry	24%	27%	→
8	Sweet	25%	23%	→
9	Delicate	20%	21%	→
10	Soft	19%	19%	→
11	Simple	17%	16%	→
12	Full-bodied	17%	15%	→
13=	Elegant	16%	14%	→
13=	Juicy	15%	14%	→
15	Bold	10%	11%	→

Ideal red wine attributes: Top 15

% who select each description for their ideal red wine
Base = All Canadian regular wine drinkers (n≥1,025)

Ranking '23		2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '22
1	Smooth	34%	34%	→
2=	Full-bodied	37%	33%	→
2=	Easy to drink	33%	33%	→
4	Rich	32%	30%	→
5	Fruity	30%	25%	↓
6=	Bold	23%	23%	→
6=	Savoury	25%	23%	→
8	Dry	22%	22%	→
9	Elegant	18%	18%	→
10=	Sweet	20%	17%	→
10=	Earthy	16%	17%	→
12	Light	15%	16%	→
13=	Soft	14%	15%	→
13=	Oaky	15%	15%	→
15=	Complex	14%	14%	→

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

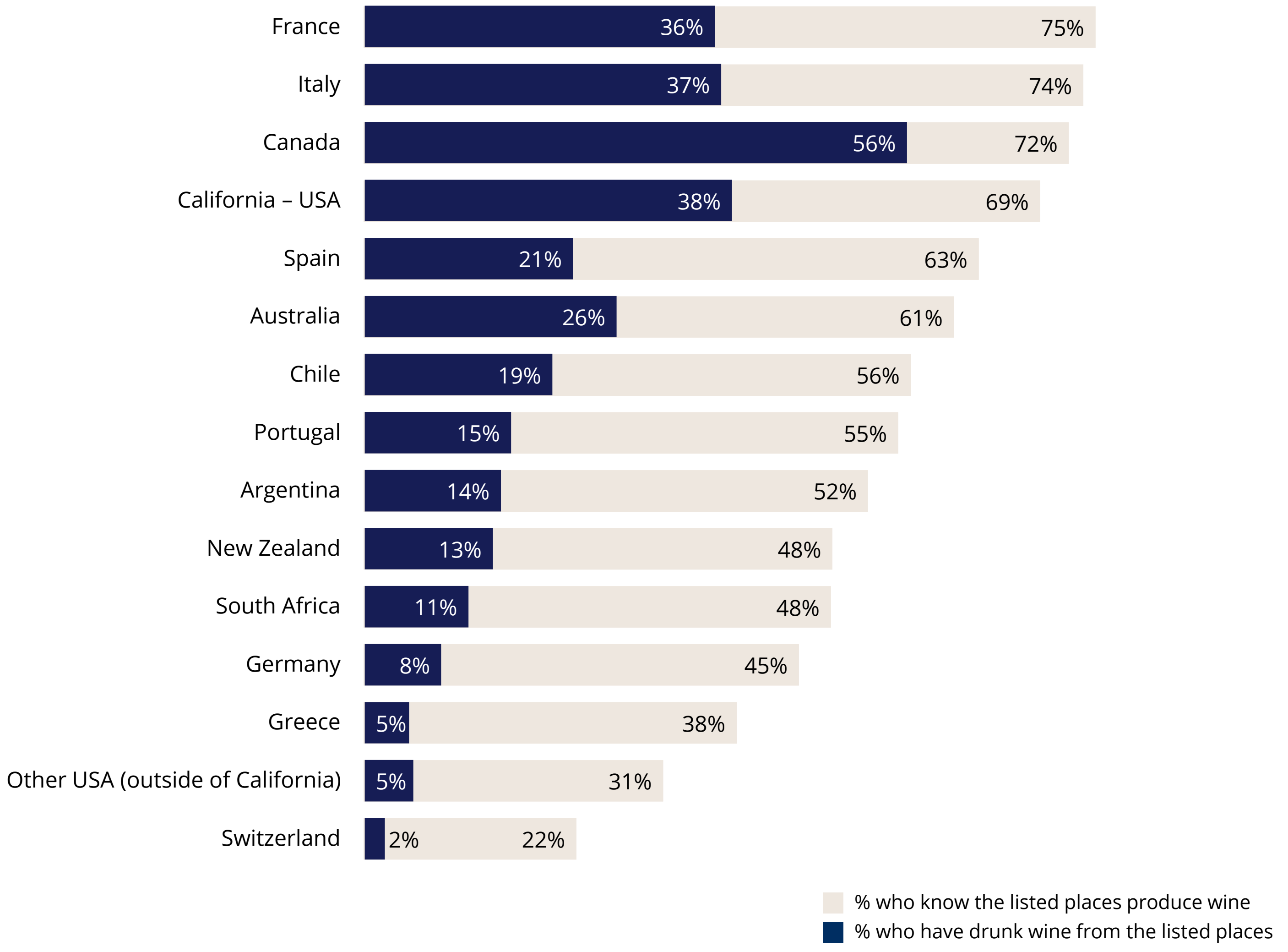
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Country of origin awareness and consumption

French and Italian wine both have higher awareness than Canadian wine among respondents, but Canadian has the highest consumption incidence

Country of origin: Top 15 awareness and consumption levels

% of those who know of or have drunk wine from the following places in the past six months
Base = All Canadian regular wine drinkers (n=1,025)



Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Country of origin awareness

Almost all countries of origin have experienced a decline in awareness since 2019, possibly indicating that some knowledgeable wine drinkers have left the category

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	France	79%	75%	75%	→	→
2	Italy	79%	73%	74%	↓	→
3	Canada	79%	75%	72%	↓	→
4	California – USA	75%	70%	69%	↓	→
5	Spain	68%	64%	63%	↓	→
6	Australia	68%	63%	61%	↓	→
7	Chile	62%	57%	56%	↓	→
8	Portugal	55%	52%	55%	→	→
9	Argentina	59%	54%	52%	↓	→
10=	New Zealand	55%	49%	48%	↓	→
10=	South Africa	54%	46%	48%	↓	→
12	Germany	49%	45%	45%	↓	→
13	Greece	38%	36%	38%	→	→
14	Other USA (outside of California)	38%	30%	31%	↓	→
15	Switzerland	21%	23%	22%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct ’19, Apr '22 + Oct '22, Apr ’23, (n≥1,000) Canadian regular wine drinkers

Country of origin consumption (1/2)

Consumption incidences have declined for the top five leading countries of origin in Canada, with the sharpest decline occurring for domestically-produced wine

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Canada	62%	55%	56%	↓	→
2	California – USA	44%	38%	38%	↓	→
3	Italy	42%	37%	37%	↓	→
4	France	42%	37%	36%	↓	→
5	Australia	31%	27%	26%	↓	→
6	Spain	22%	22%	21%	→	→
7	Chile	21%	20%	19%	→	→
8	Portugal	14%	14%	15%	→	→
9	Argentina	16%	17%	14%	→	→
10	New Zealand	14%	13%	13%	→	→
11	South Africa	13%	11%	11%	→	→
12	Germany	11%	9%	8%	↓	→
13=	Other USA (outside of California)	8%	6%	5%	↓	→
13=	Greece	3%	5%	5%	↑	→
15	Switzerland	2%	2%	2%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Country of origin consumption (2/2)

English-speaking Canadians have a significantly higher consumption incidence for domestically-produced wines, while greater numbers of French speakers drink French, Italian and Portuguese wines

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	English-speaking Canada (n=742)	French-speaking Canada (n=283)
1	Canada	56%	66%	29%
2	California – USA	38%	41%	28%
3	Italy	37%	34%	44%
4	France	36%	30%	51%
5	Australia	26%	27%	23%
6	Spain	21%	20%	25%
7	Chile	19%	21%	16%
8	Portugal	15%	12%	23%
9	Argentina	14%	14%	14%
10	New Zealand	13%	15%	9%
11	South Africa	11%	11%	9%
12	Germany	8%	8%	7%
13=	Other USA (outside of California)	5%	5%	5%
13=	Greece	5%	4%	7%
15	Switzerland	2%	2%	1%

= Represents equal ranking

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

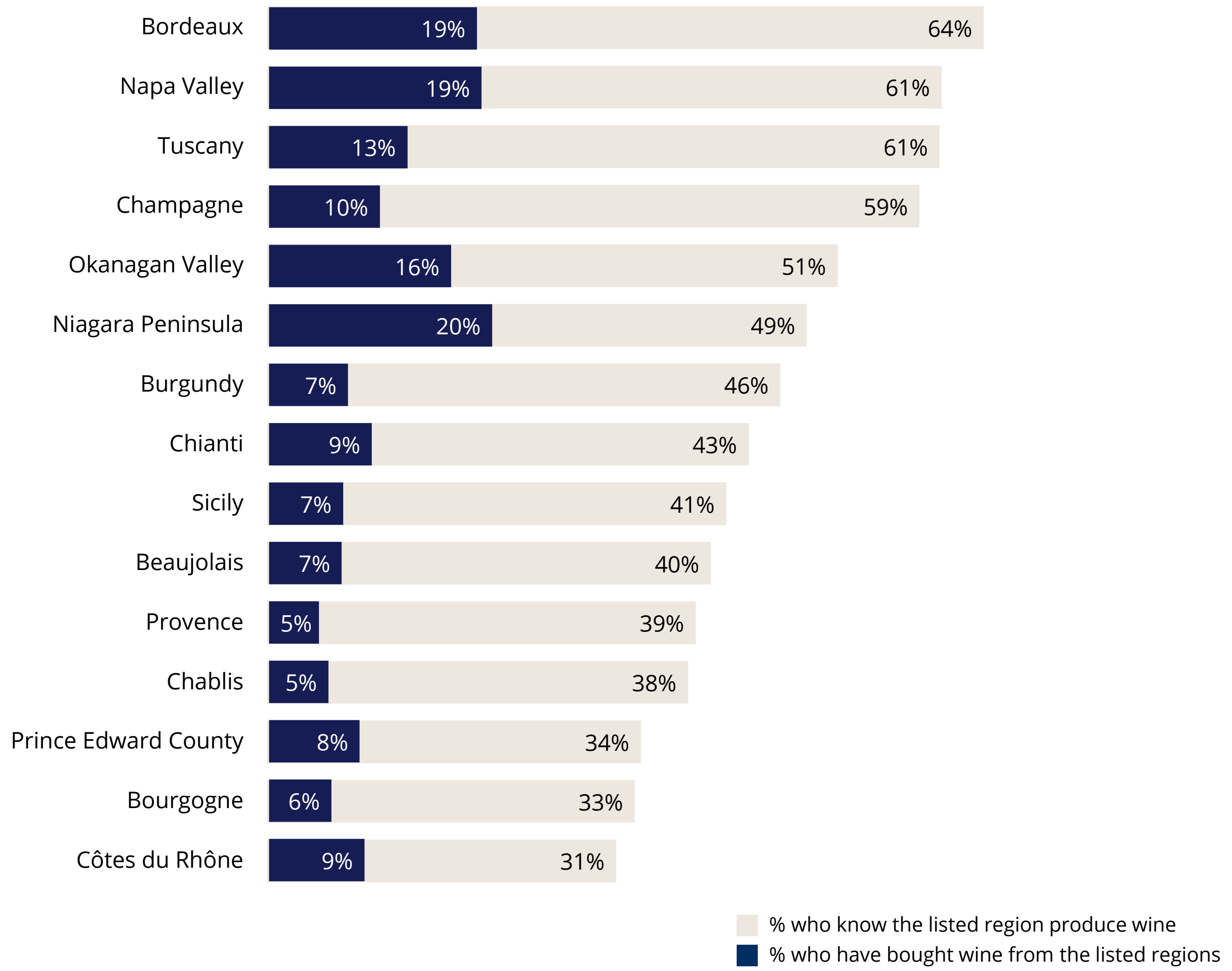
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Region of origin awareness and purchase

The top four leading regions of origin by awareness are all in Europe and the US, but the highest region for purchase is in Canada

Region of origin: Top 15 awareness and purchase levels

% of those who know of or have bought wine from the following regions in the past three months
Base = All Canadian regular wine drinkers (n=1,025)



Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Region of origin awareness

Almost all regions of origin have significantly lower awareness levels among Canadian respondents than in 2019, which, in line with other measures, indicates that knowledgeable drinkers have left the category

Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Bordeaux	71%	64%	64%	↓	→
2=	Napa Valley	72%	62%	61%	↓	→
2=	Tuscany	66%	60%	61%	↓	→
4	Champagne	64%	59%	59%	↓	→
5	Okanagan Valley	58%	52%	51%	↓	→
6	Niagara Peninsula	52%	46%	49%	→	→
7	Burgundy	53%	46%	46%	↓	→
8	Chianti	52%	46%	43%	↓	→
9	Sicily	47%	43%	41%	↓	→
10	Beaujolais	45%	39%	40%	↓	→
11	Provence	47%	41%	39%	↓	→
12	Chablis	45%	39%	38%	↓	→
13	Prince Edward County	34%	32%	34%	→	→
14	Bourgogne	38%	33%	33%	↓	→
15=	Côtes du Rhône	34%	32%	31%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Region of origin purchase (1/2)

Region of origin purchase incidences are broadly unaffected by respondents' lower awareness levels

Region of origin purchase: Top 15, tracking

% who have bought wine from the following regions in the past three months
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Niagara Peninsula	20%	18%	20%	→	→
2=	Napa Valley	23%	20%	19%	→	→
2=	Bordeaux	22%	19%	19%	→	→
4	Okanagan Valley	20%	18%	16%	→	→
5	Tuscany	12%	14%	13%	→	→
6	Champagne	9%	11%	10%	→	→
7=	Chianti	13%	11%	9%	↓	→
7=	Côtes du Rhône	10%	7%	9%	→	→
9	Prince Edward County	8%	9%	8%	→	→
10=	Burgundy	7%	7%	7%	→	→
10=	Sicily	7%	8%	7%	→	→
10=	Beaujolais	9%	7%	7%	→	→
13	Bourgogne	6%	6%	6%	→	→
14=	Chablis	5%	6%	5%	→	→
14=	Provence	5%	6%	5%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Region of origin purchase (2/2)

English speakers have a higher purchase incidence for domestic regions of origin, while significantly more French speakers buy wine from regions of France

Region of origin purchase: Top 15, tracking

% who have bought wine from the following regions in the past three months
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	English-speaking Canada (n=742)	French-speaking Canada (n=283)
1	Niagara Peninsula	20%	25%	6%
2	Napa Valley	19%	22%	13%
3	Bordeaux	19%	14%	31%
4	Okanagan Valley	16%	21%	5%
5	Tuscany	13%	12%	15%
6	Champagne	10%	10%	10%
7	Chianti	9%	8%	13%
8	Côtes du Rhône	9%	5%	18%
9	Prince Edward County	8%	11%	2%
10	Burgundy	7%	8%	5%
11	Sicily	7%	7%	5%
12	Beaujolais	7%	3%	16%
13=	Bourgogne	6%	3%	12%
13=	Chablis	5%	4%	9%
15	Provence	5%	4%	6%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Wine-Buying Behaviours

Canada Wine Landscapes

2023

Wine-buying channel usage

Canadian regular wine drinkers' purchasing habits have remained broadly stable over the past few years, though they are now buying wine less often at privatized liquor stores or wine shops attached to grocery stores than in 2019. Purchase incidences in travel retail have yet to return to pre-pandemic levels

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	In a government-controlled liquor store	69%	67%	67%	→	→
2	In a grocery store	23%	22%	23%	→	→
3	In a wine store attached to a grocery store	21%	16%	17%	↓	→
4	In a privatized liquor store	21%	15%	16%	↓	→
5	In a beer and wine	14%	14%	15%	→	→
6	In a private wine store	14%	13%	13%	→	→
7	In a super store	14%	13%	12%	→	→
8=	From a supermarket / liquor store website	n/a	9%	10%	n/a	→
8=	In a club store	11%	11%	10%	→	→
10	From a winery during a visit	n/a	7%	7%	n/a	→
11	From Duty Free	8%	5%	6%	↓	→
12=	From a make your own wine store	8%	4%	4%	↓	→
12=	From a delivery app	n/a	4%	4%	n/a	→
12=	From a wine club or membership organization	n/a	3%	4%	n/a	→
12=	From a winery's website	n/a	4%	4%	n/a	→
16	From an online retailer	n/a	4%	3%	n/a	→

16% are online wine buyers vs **18%** in 2022*

= Represents equal ranking
n/a = tracking unavailable for this wave
*Tracking not available for online users before 2022
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Consumption frequency

Significantly fewer Canadian regular wine drinkers are consuming wine on a daily or weekly basis. More Boomers drink wine daily, compared to all regular wine drinkers

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Canadian regular wine drinkers (n≥1,000)

	2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
Most days / every day	11%	9%	8%	⬇	➡
2-5 times a week	36%	30%	31%	⬇	➡
About once a week	31%	33%	32%	➡	➡
1-3 times a month	22%	27%	29%	⬆	➡

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Canadian regular wine drinkers (n=1,025)

	All Canadian Regular Wine Drinkers (n=1,025)	Gen Z LDA-26 (n=106)	Millennials 27-42 (n=322)	Gen X 43-58 (n=268)	Boomers 59+ (n=329)
Most days / every day	8%	5%	3%	6%	14%
2-5 times a week	31%	27%	33%	32%	29%
About once a week	32%	36%	36%	34%	27%
1-3 times a month	29%	32%	28%	28%	30%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Off-premise consumption frequency

Fewer respondents are drinking at home for either relaxed or informal meal occasions than in previous years

Off-premise: Wine consumption frequency by occasion

Base = Those who buy wine in the off-premise

	2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
A relaxing drink at the end of the day at home	**6.67**	**5.77**	**5.13**	⬇	⬇
With an informal meal at home	**5.88**	**5.28**	**5.00**	⬇	➡
With a more formal dinner party at home	**1.91**	**2.09**	**1.98**	➡	➡
At a party / celebration at home	**1.71**	**1.89**	**1.78**	➡	➡

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

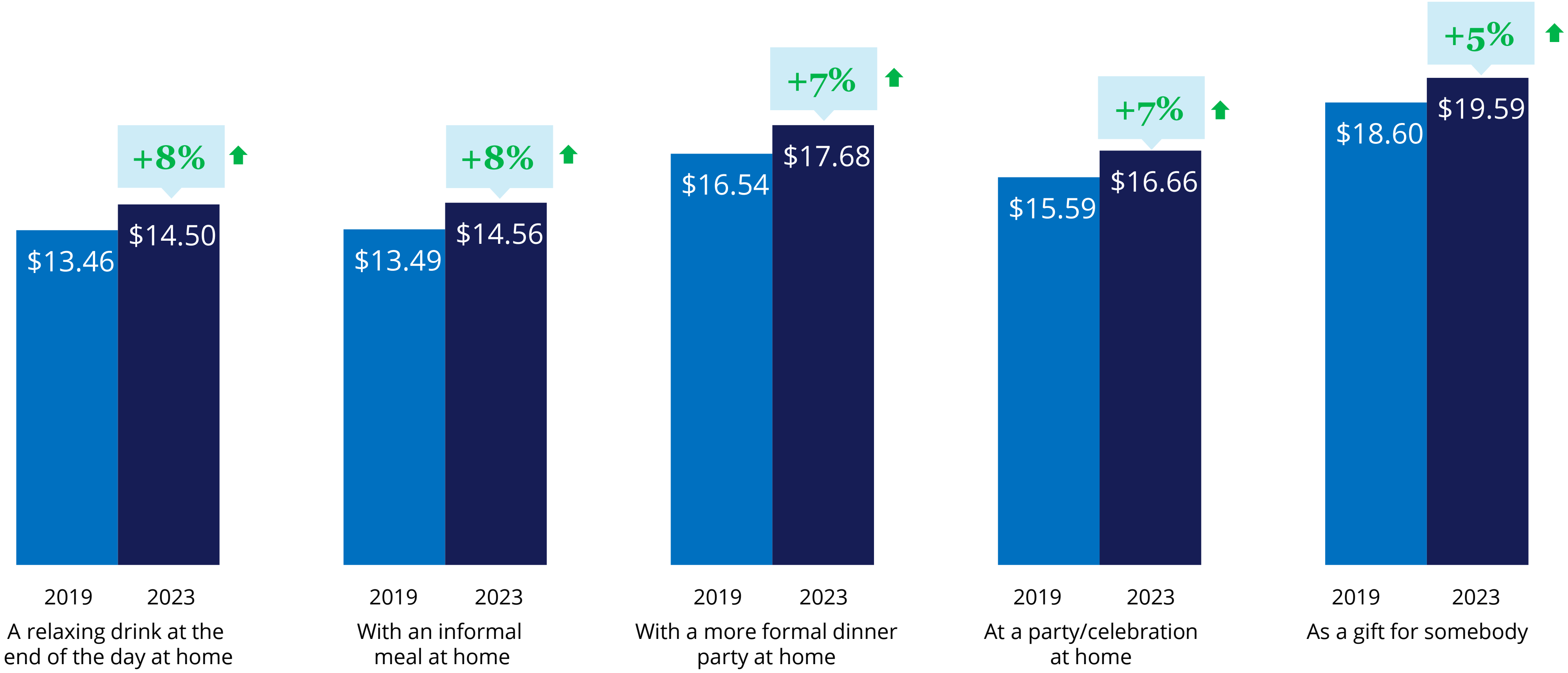
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Average off-premise spend

Wine drinkers may be adopting a less-but-better approach to the wine category; the amount spent on all off-premise occasions has increased significantly since 2019, which could be evidence of premiumisation

Off-premise: Average spend per bottle by occasion

Base = Those who buy wine in the off-premise



Market context:

Canada's alcohol escalator tax is an annual automatic increase in federal excise duty linked to inflation that was first imposed in 2017. It rose by its steepest rate so far in 2022, increasing by 6.3%. Continued high inflation will see the tax impose a bigger burden on the Canadian drinks market. Canada already has one of the world's highest rates of alcohol tax.

Executive Summary Report 2023 Canada

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '23, (n≥1,000) Canadian regular wine drinkers

On-premise consumption

On-premise consumption by Canadian wine drinkers has decreased since before the pandemic, in line with global trends. Fewer respondents are consuming wine in restaurants than in 2019

Wine purchase in on-premise

% who buy wine in a bar, pub or restaurant
Base = All Canadian regular wine drinkers (n≥1,000)

On-premise location		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
Bar or pub	Yes	41%	38%	38%	→	→
	No	59%	62%	62%	→	→
Restaurant	Yes	81%	74%	76%	↓	→
	No	19%	26%	24%	↑	→
On-premise drinkers	Yes	82%	76%	78%	↓	→
	No	18%	24%	22%	↑	→

Wine purchase in on-premise: by generation

% who buy wine in a bar, pub or restaurant
Base = All Canadian regular wine drinkers (n=1,025)

On-premise location		All Canadian Regular Wine Drinkers (n=1,025)	Gen Z LDA-26 (n=106)	Millennials 27-42 (n=322)	Gen X 43-58 (n=268)	Boomers 59+ (n=329)
Bar or pub	Yes	38%	52%	45%	38%	26%
	No	62%	48%	55%	62%	74%
Restaurant	Yes	76%	90%	78%	78%	66%
	No	24%	10%	22%	22%	34%
On-premise drinkers	Yes	78%	93%	83%	79%	67%
	No	22%	7%	17%	21%	33%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

On-premise consumption frequency

An end-of-pandemic surge in consumption in the on-premise seemed to wane in 2023

On-premise: Wine consumption frequency by occasion

Base = Those who buy wine in the on-premise

	2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
A relaxing drink out at the end of the day	**3.37**	**3.57**	**3.08**	→	↓
With an informal meal in a pub / bar / restaurant	**1.85**	**2.13**	**1.75**	→	↓
With a more formal dinner in a restaurant	**1.76**	**2.14**	**1.70**	→	↓
At a party / celebration / big night out	**1.54**	**1.90**	**1.71**	→	→

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

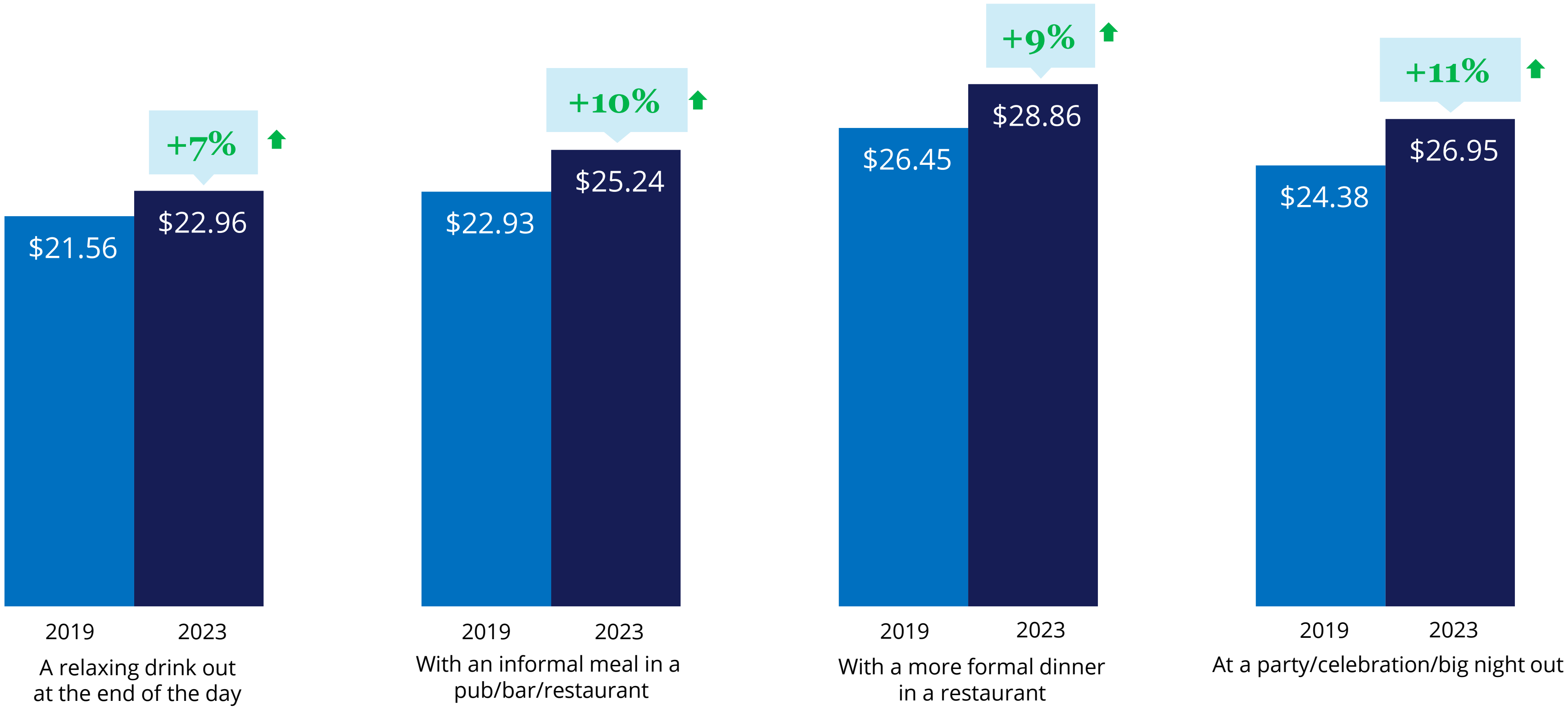
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Typical on-premise spend

Although Canadian regular wine drinkers are drinking less frequently than before, the amount spent across all on-premise occasions has increased significantly, pointing towards category premiumisation

On-premise: Typical spend per occasion

Base = Those who buy wine in the on-premise



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '23, (n≥1,000) Canadian regular wine drinkers

Wine Views and Attitudes

Canada Wine Landscapes

2023

Attitudes towards wine

Significantly fewer respondents say they are open to trying new and different styles of wine than in 2019. Greater numbers of Millennials say they are willing to experiment with their wine selection, compared to all Canadian wine drinkers

Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Canadian regular wine drinkers (n≥1,000)

	2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of wine on a regular basis	**51%**	**48%**	**44%**	↓	↓
I don't mind what I buy so long as the price is right	**26%**	**25%**	**29%**	→	↑
I know what I like and I tend to stick to what I know	**24%**	**27%**	**27%**	→	→

By generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Canadian regular wine drinkers (n=1,025)

	All Canadian Regular Wine Drinkers (n=1,025)	Gen Z LDA-26 (n=106)	Millennials 27-42 (n=322)	Gen X 43-58 (n=268)	Boomers 59+ (n=329)
I enjoy trying new and different styles of wine on a regular basis	**44%**	**50%**	**52%**	**49%**	**30%**
I don't mind what I buy so long as the price is right	**29%**	**30%**	**32%**	**30%**	**25%**
I know what I like and I tend to stick to what I know	**27%**	**19%**	**16%**	**22%**	**45%**

By language spoken

% who 'agree' or 'strongly agree' with the following statements
Base = All Canadian regular wine drinkers (n=1,025)

	All Canadian Regular Wine Drinkers (n=1,025)	English-speaking Canada (n=742)	French-speakling Canada (n=283)
I enjoy trying new and different styles of wine on a regular basis	**44%**	**42%**	**48%**
I don't mind what I buy so long as the price is right	**29%**	**33%**	**20%**
I know what I like and I tend to stick to what I know	**27%**	**25%**	**32%**

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Wine involvement

More respondents are now classified as low-involvement drinkers, with only a third considered to have high involvement. Involvement levels are broadly similar across generational groups and language spoken

Tracking

Base = All Canadian regular wine drinkers (n≥1,000)

	2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
High involvement	37%	37%	34%	➡	➡
Medium involvement	45%	42%	42%	➡	➡
Low involvement	18%	21%	24%	⬆	➡

By generation

Base = All Canadian regular wine drinkers (n=1,025)

	All Canadian Regular Wine Drinkers (n=1,025)	Gen Z LDA-26 (n=106)	Millennials 27-42 (n=322)	Gen X 43-58 (n=268)	Boomers 59+ (n=329)
High involvement	34%	31%	37%	34%	31%
Medium involvement	42%	46%	40%	41%	43%
Low involvement	24%	23%	23%	24%	26%

By language spoken

Base = All Canadian regular wine drinkers (n=1,025)

	All Canadian Regular Wine Drinkers (n=1,025)	English-speaking Canada (n=742)	French-speakling Canada (n=283)
High involvement	34%	35%	32%
Medium involvement	42%	41%	44%
Low involvement	24%	25%	24%

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

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

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Involvement and perceived expertise (1/3)

Fewer respondents feel wine is reasonably priced than in 2019, which could be a product of premiumisation; there has also been an increase in the proportion of respondents saying they know less about wine

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Drinking wine gives me pleasure	85%	81%	83%	→	→
2	I always look for the best quality wines I can get for my budget	76%	72%	74%	→	→
3	Deciding which wine to buy is an important decision	62%	63%	59%	→	→
4	I like to take my time when I purchase a bottle of wine	62%	62%	58%	→	→
5	I have a strong interest in wine	50%	51%	51%	→	→
6	Generally speaking, wine is reasonably priced	55%	53%	49%	↓	→
7	Wine is important to me in my lifestyle	49%	47%	47%	→	→
8	Compared to others, I know less about the subject of wine	37%	40%	42%	↑	→
9	Generally speaking, wine is an expensive drink	36%	39%	40%	→	→
10	I feel competent about my knowledge of wine	38%	41%	37%	→	→
11	I don't understand much about wine	25%	28%	27%	→	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Involvement and perceived expertise (2/3)

More Millennials than other age groups say they know less about wine than other people, but significantly more feel that wine is a reasonably priced drink, which could indicate that they are driving premiumisation

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	Gen Z LDA-26 (n=106)	Millennials 27-42 (n=322)	Gen X 43-58 (n=268)	Boomers 59+ (n=329)
1	Drinking wine gives me pleasure	83%	80%	83%	83%	83%
2	I always look for the best quality wines I can get for my budget	74%	72%	74%	72%	78%
3	Deciding which wine to buy is an important decision	59%	51%	59%	63%	59%
4	I like to take my time when I purchase a bottle of wine	58%	58%	60%	61%	55%
5	I have a strong interest in wine	51%	55%	54%	50%	46%
6	Generally speaking, wine is reasonably priced	49%	55%	56%	49%	42%
7	Wine is important to me in my lifestyle	47%	44%	51%	47%	45%
8	Compared to others, I know less about the subject of wine	42%	49%	48%	39%	36%
9	Generally speaking, wine is an expensive drink	40%	48%	41%	42%	34%
10	I feel competent about my knowledge of wine	37%	37%	39%	42%	32%
11	I don't understand much about wine	27%	27%	31%	26%	24%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Involvement and perceived expertise (3/3)

Significantly fewer French speakers say that wine is a reasonably priced drink or feel competent in their wine knowledge, compared to all Canadian regular wine drinkers

Involvement and perceived expertise in wine by language spoken

% who 'agree' or 'strongly agree' with the following statements
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	English-speaking Canada (n=742)	French-speakling Canada (n=283)
1	Drinking wine gives me pleasure	83%	82%	85%
2	I always look for the best quality wines I can get for my budget	74%	74%	75%
3	Deciding which wine to buy is an important decision	59%	62%	51%
4	I like to take my time when I purchase a bottle of wine	58%	58%	59%
5	I have a strong interest in wine	51%	51%	50%
6	Generally speaking, wine is reasonably priced	49%	52%	43%
7	Wine is important to me in my lifestyle	47%	48%	45%
8	Compared to others, I know less about the subject of wine	42%	42%	41%
9	Generally speaking, wine is an expensive drink	40%	40%	39%
10	I feel competent about my knowledge of wine	37%	40%	29%
11	I don't understand much about wine	27%	26%	30%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Wine knowledge and confidence

The knowledge base among Canadian regular wine drinkers has decreased significantly since 2019, with less awareness of countries and regions of origin. Confidence levels broadly align with those seen in 2019

Wine knowledge index: Tracking

Base = All Canadian regular wine drinkers (n≥1,000)

	2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
Knowledge Index	**35.0**	**32.3**	**31.4**	⬇	➡

-3.6 Index change

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

Wine confidence index: Tracking

Base = All Canadian regular wine drinkers (n≥1,000)

	2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
Confidence Index	**52.2**	**52.1**	**51.0**	➡	➡

-1.2 Index change

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Wine-drinking motivations (1/2)

Significantly more Gen Z and Millennial wine drinkers are motivated to drink wine because it makes them feel sophisticated, while greater proportions of Boomers drink wine to enhance food

Wine drinking motivations by generation

% who selected the following as reasons why they drink wine
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	Gen Z LDA-26 (n=106)	Millennials 27-42 (n=322)	Gen X 43-58 (n=268)	Boomers 59+ (n=329)
1	To celebrate special occasions	59%	58%	57%	59%	60%
2	I really love the taste of wine	53%	52%	48%	55%	57%
3	Wine enhances food and meals	52%	46%	45%	54%	58%
4	Drinking wine makes me feel relaxed	50%	49%	53%	55%	44%
5	Wine is about sharing with a partner / close friend or family member	44%	43%	43%	43%	47%
6	Wine helps create a warm / friendly atmosphere	42%	39%	44%	41%	41%
7	Wine is about sharing something with others	38%	33%	38%	39%	40%
8=	I treat myself with wine at the end of the day	30%	31%	30%	35%	26%
8=	I like learning about new wines	30%	42%	33%	29%	24%
10	Drinking wine can be good for my health	27%	25%	26%	27%	28%
11	Most of my friends drink wine	23%	25%	25%	27%	19%
12	Wine is a refreshing drink	22%	28%	20%	22%	20%
13	I like shopping / choosing wines to drink	21%	26%	22%	23%	17%
14	Wine is a fashionable drink	18%	29%	22%	15%	11%
15	It makes people sophisticated	12%	28%	18%	9%	3%
16	It makes me feel individual and unique	10%	24%	14%	9%	3%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Wine-drinking motivations (2/2)

Greater numbers of French speakers in Canada are motivated to drink wine to enhance social situations

Wine drinking motivations by language spoken

% who selected the following as reasons why they drink wine
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	English-speaking Canada (n=742)	French-speakling Canada (n=283)
1	To celebrate special occasions	59%	55%	67%
2	I really love the taste of wine	53%	53%	55%
3	Wine enhances food and meals	52%	52%	52%
4	Drinking wine makes me feel relaxed	50%	50%	52%
5	Wine is about sharing with a partner / close friend or family member	44%	40%	55%
6	Wine helps create a warm / friendly atmosphere	42%	39%	50%
7	Wine is about sharing something with others	38%	35%	46%
8=	I treat myself with wine at the end of the day	30%	30%	30%
8=	I like learning about new wines	30%	27%	38%
10	Drinking wine can be good for my health	27%	27%	27%
11	Most of my friends drink wine	23%	23%	24%
12	Wine is a refreshing drink	22%	23%	17%
13	I like shopping / choosing wines to drink	21%	21%	20%
14	Wine is a fashionable drink	18%	18%	17%
15	It makes people sophisticated	12%	12%	12%
16	It makes me feel individual and unique	10%	11%	9%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Wine-buying choice cues (1/2)

Canadian wine drinkers value a narrower range of choice cues when deciding which wines to buy; long-term declines for both grape variety and food pairings could indicate less interest in a wine's taste when choosing

Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	A brand I am aware of	69%	71%	71%	→	→
2	Grape variety	74%	75%	69%	↓	↓
3	The country of origin	67%	68%	64%	→	↓
4=	Taste or wine style descriptions displayed on the shelves or on wine labels	66%	64%	63%	→	→
4=	Recommendation by friend or family	66%	63%	63%	→	→
6	Promotional offer	66%	61%	61%	↓	→
7	Wine that matches or complements food	65%	66%	60%	↓	↓
8	The region of origin	62%	63%	59%	→	↓
9	Recommendations from shop staff or shop leaflets	48%	47%	47%	→	→
10	Alcohol content	47%	51%	45%	→	↓
11	Appeal of the bottle and / or label design	39%	40%	39%	→	→
12	Recommendation by wine critic or writer	34%	39%	34%	→	↓
13	Recommendation by wine guide books	32%	34%	30%	→	↓
14	Whether or not the wine has won a medal or award	28%	29%	25%	→	↓

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Wine-buying choice cues (2/2)

The choice cues of English and French speaking Canadians are broadly aligned, although a greater proportion of French speakers are motivated to buy wine based on recommendations from a book

Wine choice cues by language spoken

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	English-speaking Canada (n=742)	French-speakling Canada (n=283)
1	A brand I am aware of	71%	70%	74%
2	Grape variety	69%	70%	66%
3	The country of origin	64%	63%	66%
4=	Taste or wine style descriptions displayed on the shelves or on wine labels	63%	62%	66%
4=	Recommendation by friend or family	63%	63%	63%
6	Promotional offer	61%	62%	57%
7	Wine that matches or complements food	60%	59%	65%
8	The region of origin	59%	59%	60%
9	Recommendations from shop staff or shop leaflets	47%	47%	49%
10	Alcohol content	45%	44%	48%
11	Appeal of the bottle and / or label design	39%	39%	39%
12	Recommendation by wine critic or writer	34%	32%	39%
13	Recommendation by wine guide books	30%	27%	38%
14	Whether or not the wine has won a medal or award	25%	25%	25%

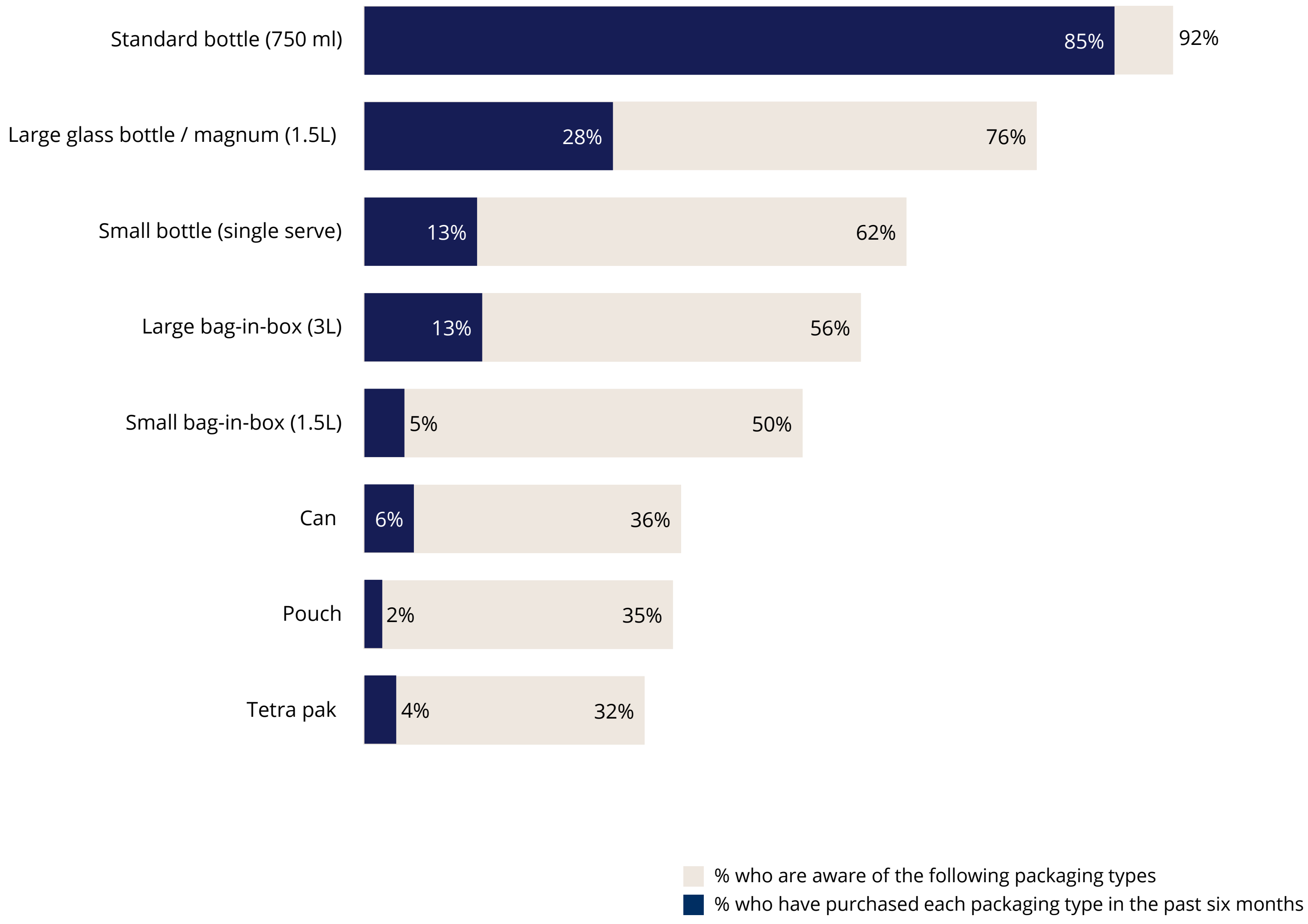
= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Packaging type awareness and purchase

Most respondents have bought wine in a standard bottle in the past six months, while over a quarter have purchased a magnum. Awareness of alternative packaging types is relatively high among Canadian respondents, although this doesn't directly translate into purchases

Packaging types: Awareness and purchase levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All Canadian regular wine drinkers (n=1,025)



Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Packaging purchase

Gen Z drinkers have significantly higher purchase incidences across several niche packaging formats, including cans and Tetra Pak

Market context:

While most wine is still sold in glass bottles, wineries are now offering alternative packaging in the form of cans and Bag-in-Box to improve portability and compete for occasions where glass is less convenient

Executive Summary Report 2023 Canada

Packaging purchase: Tracking

% who have purchased wine in the following packaging types
Base = All Canadian regular wine drinkers (n≥1,025)

Ranking '23		2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '22
1	Standard bottle (750 ml)	**82%**	**85%**	↑
2	Large glass bottle / magnum (1.5L)	**27%**	**28%**	→
3=	Large bag-in-box (3L)	**12%**	**13%**	→
3=	Small bottle (single serve)	**11%**	**13%**	→
5	Can	**5%**	**6%**	→
6	Small bag-in-box (1.5L)	**5%**	**5%**	→
7	Tetra pak	**4%**	**4%**	→
8	Pouch	**3%**	**2%**	→

Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All Canadian regular wine drinkers (n=1,025)

Ranking '23		All Canadian Regular Wine Drinkers (n=1,025)	Gen Z LDA-26 (n=106)	Millennials 27-42 (n=322)	Gen X 43-58 (n=268)	Boomers 59+ (n=329)
1	Standard bottle (750 ml)	**85%**	**83%**	**80%**	**88%**	**88%**
2	Large glass bottle / magnum (1.5L)	**28%**	**38%**	**33%**	**27%**	**21%**
3=	Large bag-in-box (3L)	**13%**	**14%**	**10%**	**15%**	**15%**
3=	Small bottle (single serve)	**13%**	**23%**	**13%**	**13%**	**8%**
5	Can	**6%**	**12%**	**10%**	**4%**	**1%**
6	Small bag-in-box (1.5L)	**5%**	**6%**	**5%**	**5%**	**4%**
7	Tetra pak	**4%**	**8%**	**3%**	**3%**	**3%**
8	Pouch	**2%**	**8%**	**3%**	**1%**	**1%**

Note: packaging tracking is not available for 2019
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada,, Apr '22, Apr '23, (n≥1,025) Canadian regular wine drinkers

Hot Topic: Wine Closures

Canada Wine Landscapes

2023

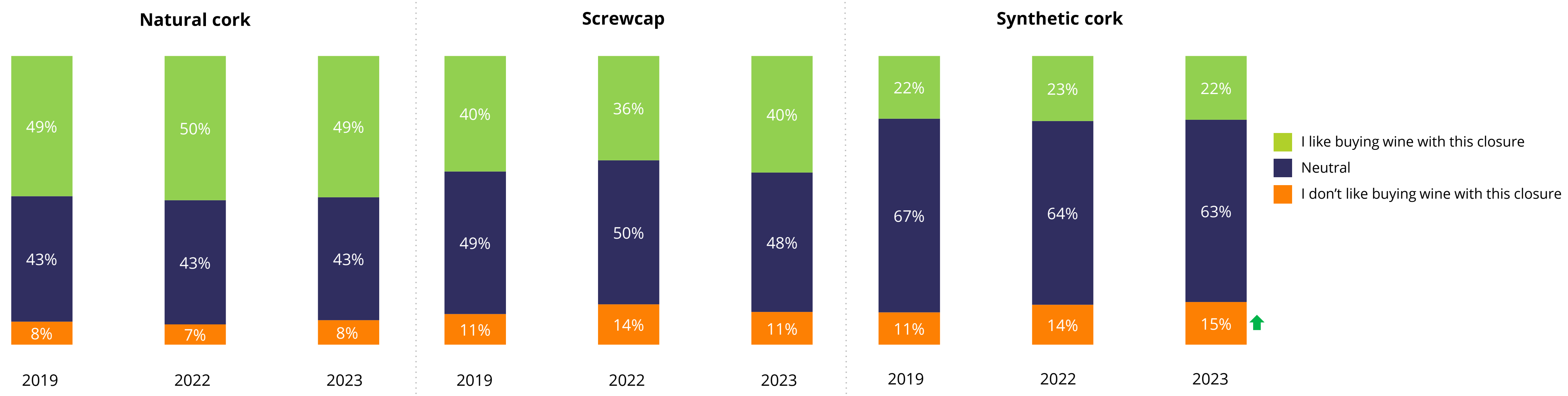
HOT TOPIC

Wine closures

Respondents' opinions on wine closures have remained broadly the same since 2019, although significantly more of them don't like buying wine with a synthetic cork

Views on wine closures

% who 'agree' or 'strongly agree' with the following statements
Base = All Canadian regular wine drinkers (n≥1,000)



⬆/⬇: Statistically significantly higher / lower than the 2019 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

HOT TOPIC

Views on wine closure types

Natural corks are more closely associated with being high quality, traditional and good for special occasions, but are also considered outdated. Screw-caps are perceived as practical, good for everyday drinking and affordable, but also cheap and low quality

Wine closure types imagery

% who associate the following statements with each type of wine closure
Base = All Canadian regular wine drinkers (n=1,025)

	Natural cork (n=1,025)	Screw-cap (n=1,025)	Synthetic cork (n=1,025)
Practical	13%	56%	20%
Trustworthy	38%	26%	21%
Good for everyday drinking	18%	46%	21%
Recyclable	27%	33%	22%
Traditional	61%	8%	10%
Affordable	16%	42%	20%
Modern	11%	34%	32%
Good for special occasions	42%	15%	15%
Sustainable	27%	24%	21%
High quality	47%	11%	14%
Opening a wine with this type of closure gives me pleasure	38%	17%	11%
Cheap	6%	36%	17%
Innovative	9%	20%	29%
Low quality	4%	23%	14%
Outdated	20%	8%	10%
None of the above	8%	8%	12%

Green / turquoise: Statistically significantly higher than 2 / 1 wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Hot Topic:
Consumer Sentiment

Canada Wine Landscapes

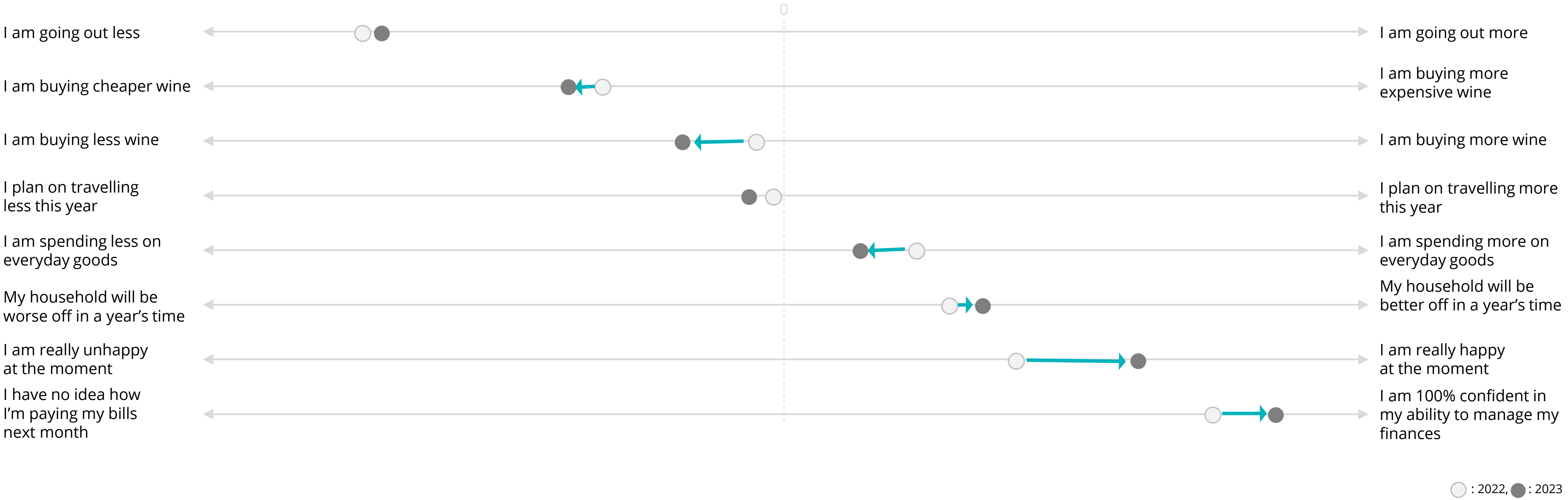
2023

Consumer sentiment

Respondents are generally happy and financially confident, but more say they buy less wine than a year ago, which could explain declining consumption; they are also going out less and showing signs of down-trading

Consumer sentiment: tracked

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -41%, Maximum value: 57%
Base = All Canadian regular wine drinkers (n≥1,025)



Source: Wine Intelligence, Vinitrac®, Canada, Apr '22, Apr '23, (n≥1,025) Canadian regular wine drinkers

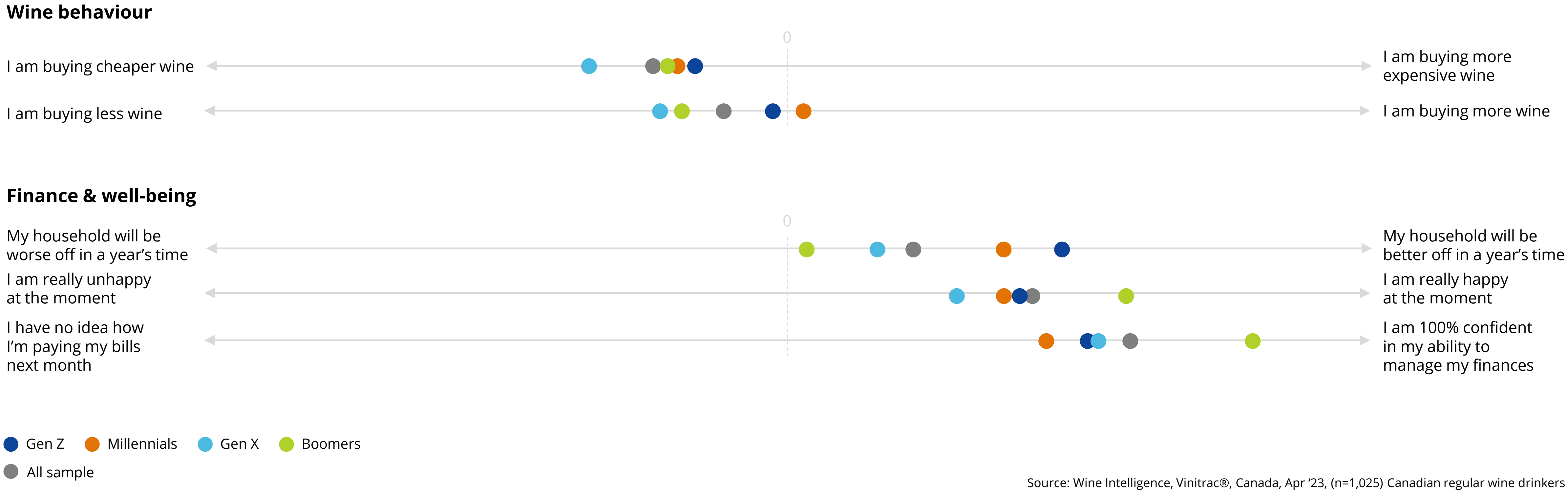
HOT TOPIC

Consumer sentiment

All age groups are down-trading their wine selections, though this is especially true of Gen X; older people are buying less wine, while younger age groups are broadly buying the same amount

Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -53%, Maximum value: 76%
Base = All Canadian regular wine drinkers (n=1,025)



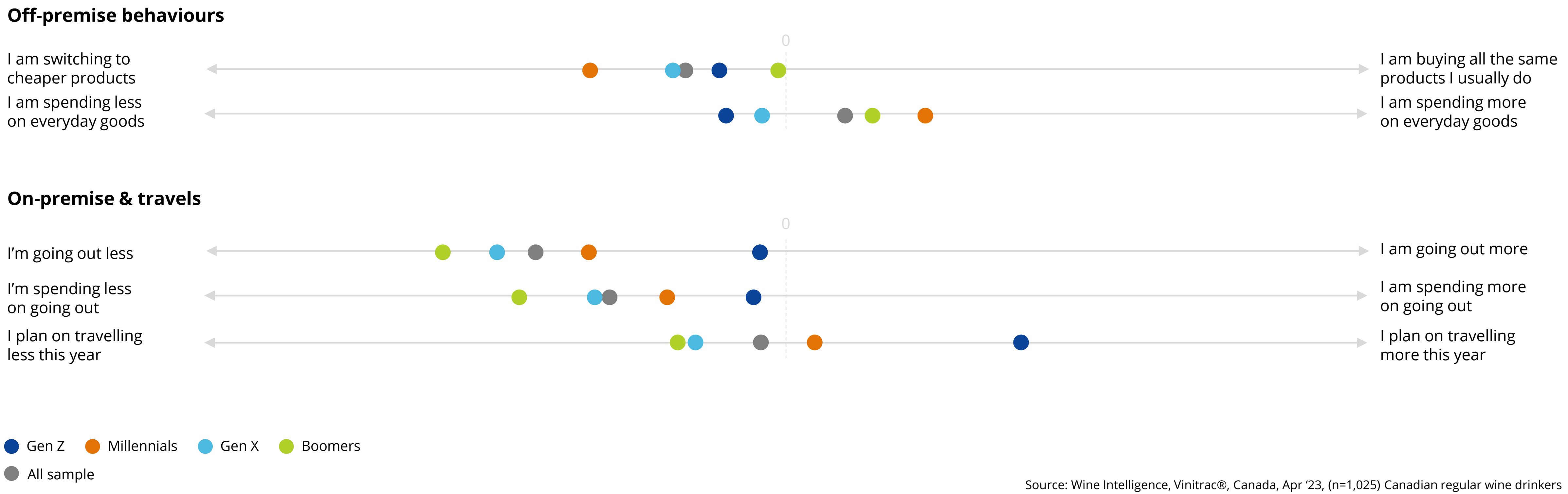
Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Consumer sentiment

All age groups are going out and spending less, but this is most pronounced among older people; Millennials feel inflationary pressure the most, with many reporting down-trading, while spending more on everyday goods

Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -53%, Maximum value: 76%
Base = All Canadian regular wine drinkers (n=1,025)



Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Brand Health

Canada Wine Landscapes

2023

Global Wine Brand Power Index

Brand health measures included in the index

Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	**Brand awareness index**	**Wine Brand Power Index**
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	**Brand purchase index**	
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand		
Consideration	% who would consider buying each brand Base = Those who have heard of each brand		
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**	
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand		

Canadian Brand Power 2023

The three most powerful brands in the Canadian market are unchanged in 2023

[yellow tail]® 1st

JACKSON TRIGGS 2nd

JACOB'S CREEK® 3rd

Canadian Brand Power Index 2023

While the top three leading brands have remained unchanged, Yellow Tail's lead over Jackson-Triggs has narrowed in the past 12 months

Canadian Brand Power Index

The top 30 most powerful wine brands in the Canadian market based on consumer feedback from six key brand health measures
Base = All Canadian regular wine drinkers (n≥1,002)

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Yellow Tail	94.7	=	-1.7
2	Jackson-Triggs	91.1	=	3.5
3	Jacob's Creek	88.7	=	1.8
4	Barefoot	76.4	=	-1.7
5	Kim Crawford	69.1	↑+3	4.8
6	Peller Estates	68.1	↑+1	2.8
7	Naked Grape	66.1	↑+5	3.6
8=	Oyster Bay	65.8	↑+3	2.8
8=	Inniskillin	65.8	↑+1	2.3
10	Sawmill Creek	65.7	↓-1	1.8
11	Apothic	62.8	↓-6	-5.1
12	Masi	62.1	↓-6	-3.8
13	Bodacious	61.0	↑+1	-0.4
14	Woodbridge	59.8	↓-1	-2.3
15	Gallo Family Vineyards	59.7	↑+3	2.0

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16=	Casillero del Diablo	58.4	=	-2.0
16=	Wolf Blass	58.4	↓-2	-2.2
18	Ruffino	57.0	↓-1	-0.7
19	Robert Mondavi	55.7	=	-1.6
20	Mouton Cadet	54.7	↑+4	-0.6
21	Pelee Island	54.6	↑+1	-1.4
22	Lindeman's	54.2	↑+8	3.0
23	Beringer	53.7	↓-3	-3.0
24	Wayne Gretzky Estates	53.2	↓-3	-3.1
25	Santa Carolina	52.8	↑+6	3.3
26	Mission Hill	51.9	↑+1	-0.6
27	Two Oceans	51.4	↓-1	-2.2
28	Ménage à Trois	51.3	↓-5	-4.0
29	Trapiche	51.0	=	-0.3
30	J.P. Chenet	50.8	↑+4	3.5

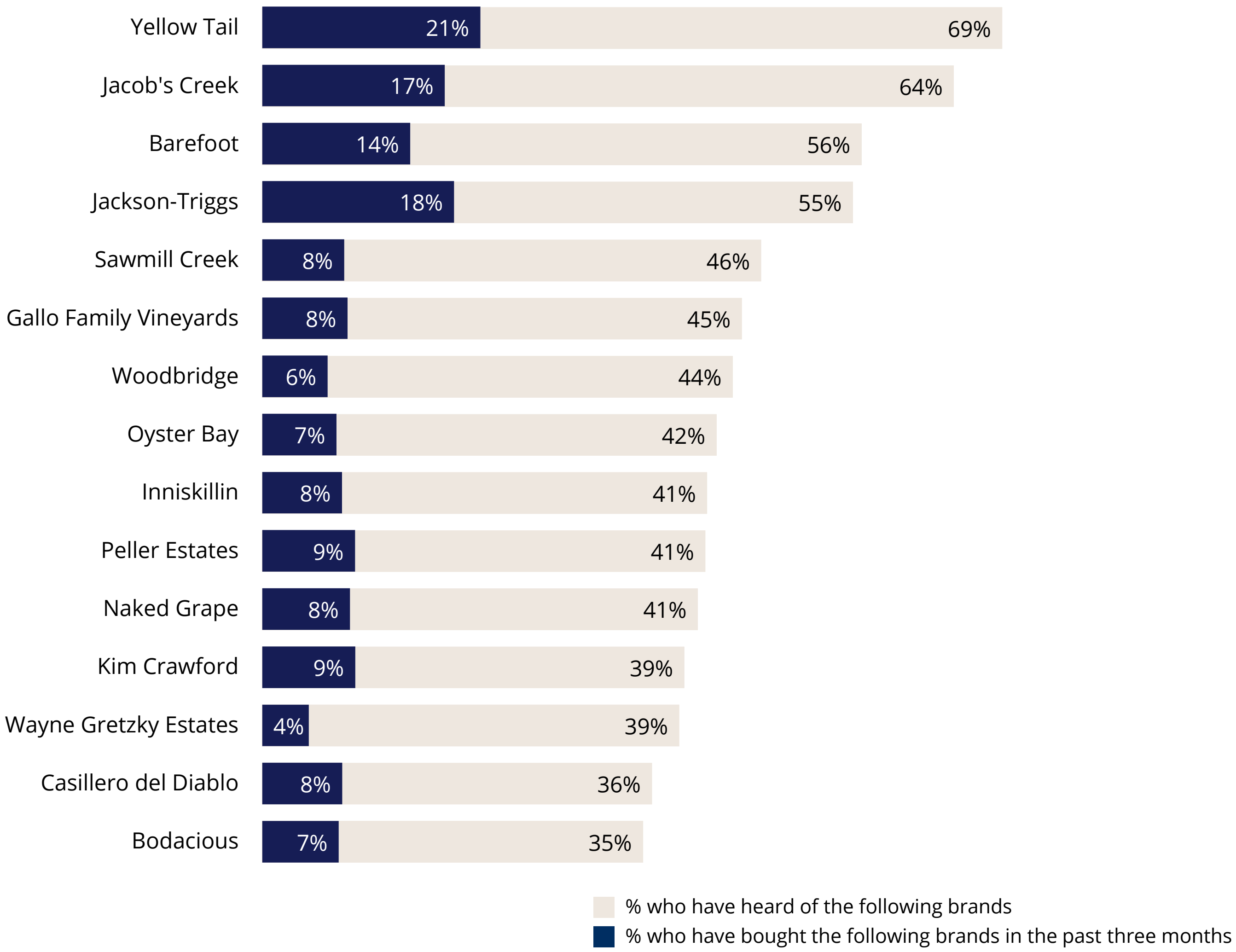
Source: Wine Intelligence, Vinitrac®, Canada, Feb '22. Apr '23, (n>1,025) Canadian regular wine drinkers

Brand health: Awareness and purchase

The top three leading brands for awareness all originate from outside Canada, with Jackson-Triggs the leading domestic brand for both awareness and purchase

Brand health: Top 15 awareness and purchase levels

Base = All Canadian regular wine drinkers (n=1,025)



Source: Wine Intelligence, Vinitrac®, Canada, Apr '23, (n=1,025) Canadian regular wine drinkers

Brand awareness: Tracking

Awareness has declined for many brands in Canada since 2019, especially within the top 10

Awareness: Tracking

% who have heard of the following brands
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	76%	69%	69%	↓	→
2	Jacob's Creek	66%	63%	64%	→	→
3	Barefoot	61%	58%	56%	↓	→
4	Jackson-Triggs	63%	58%	55%	↓	→
5	Sawmill Creek	51%	48%	46%	↓	→
6	Gallo Family Vineyards	49%	46%	45%	↓	→
7	Woodbridge	50%	46%	44%	↓	→
8	Oyster Bay	48%	44%	42%	↓	→
9=	Inniskillin	41%	42%	41%	→	→
9=	Peller Estates	48%	41%	41%	↓	→
9=	Naked Grape	54%	45%	41%	↓	↓
12=	Kim Crawford	43%	42%	39%	→	→
12=	Wayne Gretzky Estates	42%	37%	39%	→	→
14	Casillero del Diablo	36%	36%	36%	→	→
15=	Bodacious	33%	37%	35%	→	→

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
15=	Apothic	38%	37%	35%	→	→
17	Wolf Blass	43%	37%	34%	↓	→
18	Mouton Cadet	36%	33%	32%	→	→
19=	Ménage à Trois	37%	32%	31%	↓	→
19=	Robert Mondavi	38%	32%	31%	↓	→
21=	Ruffino	36%	32%	30%	↓	→
21=	Two Oceans	31%	28%	30%	→	→
23	Lindeman's	38%	32%	29%	↓	→
24=	Mission Hill	36%	27%	28%	↓	→
24=	Wallaroo Trail	27%	30%	28%	→	→
24=	Pelee Island	35%	30%	28%	↓	→
24=	Beringer	33%	31%	28%	↓	↓
28	Masi	25%	26%	25%	→	→
29=	Santa Carolina	19%	21%	24%	↑	→
29=	XOXO	18%	22%	24%	↑	→

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Brand purchase: Tracking

Purchase incidences in Canada are very low, especially outside of the top four brands, two of which have seen significant declines in this measure since 2019

Purchase: Tracking

% who have bought the following brands in the past three months
Base = All Canadian regular wine drinkers (n≥1,000)

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	25%	21%	21%	↓	→
2	Jackson-Triggs	23%	16%	18%	↓	→
3	Jacob's Creek	15%	16%	17%	→	→
4	Barefoot	16%	14%	14%	→	→
5=	Kim Crawford	8%	10%	9%	→	→
5=	Peller Estates	9%	8%	9%	→	→
7=	Naked Grape	10%	8%	8%	→	→
7=	Gallo Family Vineyards	9%	6%	8%	→	→
7=	Apothic	10%	10%	8%	→	→
7=	Sawmill Creek	9%	8%	8%	→	→
7=	Casillero del Diablo	7%	7%	8%	→	→
7=	Inniskillin	6%	8%	8%	→	→
13=	Bodacious	9%	8%	7%	→	→
13=	Oyster Bay	8%	8%	7%	→	→
15=	Masi	6%	7%	6%	→	→

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
15=	Woodbridge	9%	7%	6%	↓	→
17=	Ménage à Trois	7%	7%	5%	→	→
17=	Ruffino	6%	7%	5%	→	→
17=	Beringer	6%	4%	5%	→	→
17=	Wallaroo Trail	6%	5%	5%	→	→
17=	Mouton Cadet	6%	5%	5%	→	→
17=	Wolf Blass	6%	6%	5%	→	→
17=	Trapiche	5%	5%	5%	→	→
17=	Lindeman's	6%	4%	5%	→	→
17=	Santa Carolina	4%	4%	5%	→	→
17=	J.P. Chenet	4%	5%	5%	→	→
17=	Pelee Island	7%	5%	5%	→	→
17=	Gato Negro	3%	4%	5%	→	→
17=	Two Oceans	6%	4%	5%	→	→
30=	Smoky Bay	n/a	n/a	4%	n/a	n/a

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Brand conversion: Tracking

Jackson-Triggs has overtaken Yellow Tail to become the leading brand for conversion among Canadian regular wine drinkers in the past year; this measure has remained broadly stable, even with declines in awareness rates

Conversion: Tracking

% who have bought the following brands in the past three months
Base = Those who have heard of each brand

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Jackson-Triggs	36%	28%	33%	→	↑
2	Yellow Tail	33%	31%	30%	→	→
3	Jacob's Creek	23%	25%	27%	→	→
4=	Barefoot	26%	24%	25%	→	→
4=	Silk and Spice	n/a	n/a	25%	n/a	n/a
4=	Masi	25%	29%	25%	→	→
4=	Smoky Bay	n/a	n/a	25%	n/a	n/a
8	Revolution	29%	20%	24%	→	→
9=	Apothic	26%	27%	23%	→	→
9=	Farnese	14%	19%	23%	→	→
9=	Nicolas Laloux	24%	24%	23%	→	→
12=	Kim Crawford	19%	23%	22%	→	→
12=	Trapiche	26%	20%	22%	→	→
14=	Peller Estates	19%	19%	21%	→	→
14=	J.P. Chenet	21%	25%	21%	→	→
14=	Botter	9%	11%	21%	→	→
14=	Casillero del Diablo	20%	20%	21%	→	→
14=	Naked Grape	18%	19%	21%	→	→
19=	Bodacious	25%	22%	20%	→	→
19=	Santa Carolina	20%	19%	20%	→	→
19=	Campo Viejo	15%	17%	20%	→	→
19=	Gato Negro	13%	16%	20%	↑	→
23=	Cono Sur	n/a	23%	19%	n/a	→
23=	Beringer	17%	13%	19%	→	↑
23=	Aveleda	11%	24%	19%	→	→
23=	Frontera	18%	19%	19%	→	→
23=	Wallaroo Trail	22%	17%	19%	→	→
28=	XOXO	24%	21%	18%	→	→
28=	Inniskillin	16%	18%	18%	→	→
28=	Gallo Family Vineyards	18%	13%	18%	→	↑

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Brand consideration: Tracking

Consideration rates have declined across brands in the Canadian market since 2019, suggesting consumers are becoming less connected to wine brands as a whole

Consideration: Tracking

% who would consider buying the following brands
Base = Those who have heard of each brand

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Jackson-Triggs	66%	60%	60%	↓	→
2	Masi	66%	58%	54%	↓	→
3=	Jacob's Creek	62%	58%	53%	↓	→
3=	Yellow Tail	64%	57%	53%	↓	→
5	Kim Crawford	59%	48%	52%	↓	→
6=	Peller Estates	64%	53%	51%	↓	→
6=	Oyster Bay	57%	53%	51%	→	→
8=	Robert Mondavi	58%	49%	50%	→	→
8=	Naked Grape	59%	48%	50%	↓	→
8=	Inniskillin	54%	52%	50%	→	→
8=	Cono Sur	n/a	54%	50%	n/a	→
12	Wolf Blass	62%	53%	49%	↓	→
13	Pelee Island	64%	53%	48%	↓	→
14=	Smoky Bay	n/a	n/a	47%	n/a	n/a
14=	Apothic	63%	52%	47%	↓	→

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
14=	Santa Carolina	59%	46%	47%	↓	→
14=	Sawmill Creek	59%	49%	47%	↓	→
18=	Beringer	57%	48%	46%	↓	→
18=	Barefoot	59%	52%	46%	↓	↓
20=	Casillero del Diablo	51%	47%	45%	→	→
20=	J.P. Chenet	52%	44%	45%	→	→
20=	Woodbridge	59%	49%	45%	↓	→
23=	Bodacious	60%	48%	44%	↓	→
23=	Gato Negro	46%	44%	44%	→	→
23=	Lindeman's	56%	47%	44%	↓	→
23=	Aveleda	42%	46%	44%	→	→
23=	Hardys	54%	39%	44%	→	→
23=	Trapiche	55%	49%	44%	↓	→
23=	Mission Hill	52%	45%	44%	↓	→
23=	Ruffino	55%	48%	44%	↓	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Brand affinity: Tracking

Affinity incidences among respondents have declined for several brands since 2019, suggesting they believe that fewer brands are right for people like them

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking	
					vs. '19	vs. '22
1	Jackson-Triggs	56%	43%	46%	↓	→
2=	Masi	51%	44%	42%	→	→
2=	Yellow Tail	50%	44%	42%	↓	→
4=	Kim Crawford	39%	37%	40%	→	→
4=	Naked Grape	43%	35%	40%	→	→
6=	Jacob's Creek	47%	41%	39%	↓	→
6=	Peller Estates	45%	40%	39%	→	→
8=	Oyster Bay	40%	37%	38%	→	→
8=	Cono Sur	n/a	41%	38%	n/a	→
8=	Inniskillin	41%	38%	38%	→	→
11=	Barefoot	46%	37%	37%	↓	→
11=	Ruffino	39%	35%	37%	→	→
11=	Sawmill Creek	44%	37%	37%	↓	→
11=	Bodacious	45%	38%	37%	↓	→
15	Apothic	49%	39%	36%	↓	→
16=	Pelee Island	48%	39%	35%	↓	→
16=	Wolf Blass	43%	39%	35%	↓	→
16=	Santa Carolina	39%	30%	35%	→	→
16=	Beringer	39%	33%	35%	→	→
16=	Ravenswood	37%	25%	35%	→	↑
21=	Mission Hill	38%	34%	34%	→	→
21=	Smoky Bay	n/a	n/a	34%	n/a	n/a
21=	Robert Mondavi	40%	36%	34%	→	→
21=	Campo Viejo	33%	28%	34%	→	→
25=	Gato Negro	36%	26%	33%	→	↑
25=	Casillero del Diablo	37%	33%	33%	→	→
25=	Lindeman's	38%	33%	33%	→	→
28=	Two Oceans	38%	32%	32%	→	→
28=	Trapiche	41%	28%	32%	→	→
28=	Cupcake	36%	32%	32%	→	→

Results for all brands available in the data table

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Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Brand recommendation: Tracking

Recommendation rates have remained stable in Canada since 2019, even though other connection measures have declined in the same period

Recommendation: Tracking

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
1	Jackson-Triggs	46%	41%	45%	→	→
2	Masi	40%	45%	42%	→	→
3	Cono Sur	n/a	38%	41%	n/a	→
4	Kim Crawford	38%	38%	40%	→	→
5=	Jacob's Creek	39%	40%	39%	→	→
5=	Yellow Tail	43%	41%	39%	→	→
7=	Ruffino	35%	34%	37%	→	→
7=	Apothic	41%	39%	37%	→	→
9=	J.P. Chenet	32%	33%	36%	→	→
9=	Mouton Cadet	40%	34%	36%	→	→
9=	Robert Mondavi	35%	35%	36%	→	→
12=	Lindeman's	34%	31%	35%	→	→
12=	Peller Estates	37%	32%	35%	→	→
12=	Inniskillin	32%	34%	35%	→	→
15=	Bodacious	35%	33%	34%	→	→

Ranking '23		2019 (n=1,000)	2022 (n=2,020)	2023 (n=1,025)	Tracking vs. '19	Tracking vs. '22
15=	Trapiche	36%	32%	34%	→	→
15=	Oyster Bay	35%	34%	34%	→	→
18	Wolf Blass	38%	38%	33%	→	→
19=	Les Dauphins	31%	24%	32%	→	→
19=	Aveleda	21%	33%	32%	→	→
19=	Pelee Island	38%	33%	32%	→	→
19=	Santa Carolina	31%	29%	32%	→	→
23=	Naked Grape	33%	28%	31%	→	→
23=	Farnese	26%	25%	31%	→	→
23=	Nicolas Laloux	24%	27%	31%	→	→
23=	Mission Hill	31%	29%	31%	→	→
27=	Barefoot	38%	35%	30%	↓	↓
27=	Doña Paula	n/a	30%	30%	n/a	→
27=	Silk and Spice	n/a	n/a	30%	n/a	n/a
27=	Ménage à Trois	35%	35%	30%	→	→

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Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

Research Methodology

Canada Wine Landscapes

2023

Research methodology

QUANTITATIVE

Data was collected in Canada since October 2019.

The April 2023 waves were tracked against October 2019 and April 2022/October 2022.

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-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.

		Oct-19	Apr-22 + Oct-22	Apr-23
	n=	1,000	2,020	1,025
Gender*	Male	51%	51%	46%
	Female	49%	49%	53%
	Total	***100%***	***100%***	***99%***
Age	19-24	7%	5%	8%
	25-34	22%	22%	18%
	35-44	18%	20%	19%
	45-54	17%	17%	16%
	55-64	17%	16%	16%
	65 and over	20%	19%	23%
	Total	***100%***	***100%***	***100%***
Province	Québec	25%	29%	28%
	Ontario	38%	38%	39%
	West	31%	28%	28%
	Other Provinces	5%	5%	5%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac®, Canada, Oct '19, Apr '22 + Oct '22, Apr '23, (n≥1,000) Canadian regular wine drinkers

**Please note that additional gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas*

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