wine intelligence

A division of the IWSR Group

Canada

Sparkling Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

The sparkling wine market in Canada has experienced a remarkable surge in popularity, with a 34% increase in monthly consumers, reaching nearly 5 million adults in 2023

Sparkling wine stands out as the only sub-category that has consistently grown over the past five years, boasting a compound annual growth rate (CAGR) of 6.1%. Growth is projected to continue at the same pace for the next five years.

Despite its rapid ascent, sparkling wine is still a niche segment, accounting for just 5% of total wine consumption in Canada in 2022 .

Italy reigns supreme in sparkling wines, capturing 40% of total market share, with 85% of that attributable to Prosecco. It leads the pack in terms of consumer conversion, with an impressive 75% of those aware of it becoming regular drinkers.

While Prosecco has become a mainstream choice, it has faced some perception challenges, particularly in being seen as less fashionable and popular to drink with friends than other sparkling wine types. Champagne, on the other hand, maintains a strong image associated with superior quality, tradition and sophistication. Despite this, Champagne sales dipped in 2022, marking a shift in consumption patterns. Sparkling wine, traditionally reserved for special occasions, is increasingly being seen as a casual evening drink.

Consumption frequency of sparkling wine has risen since 2019 but it remains an occasional indulgence for most Canadians.

Brand awareness and recommendations from friends or family play pivotal roles in consumer choices. Despite declines in awareness since 2019, most sparkling wine brands have maintained steady performance metrics, indicating market stability and consumer loyalty.

Opportunities

Growing base of consumers.
Increased consumption frequency.
Brand loyalty.
Premiumisation.

Threats

Italian wine dominance.
Brand dependence.
Value and standard segments in decline.

Management Summary

Sparkling wine in the Canadian market

2023

1. Sparkling wine market growth

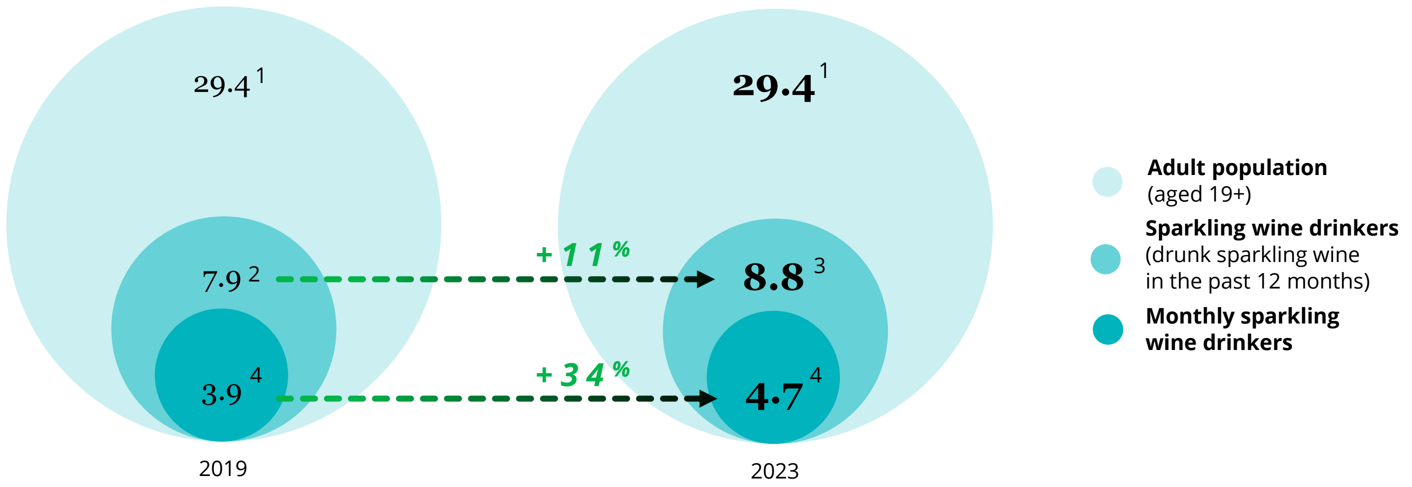
Canada has witnessed a noteworthy surge in the popularity of sparkling wine, evidenced by a 34% increase in monthly consumers, reaching close to 5 million of adults in 2023.

Sparkling wine is the only wine sub-category to have experienced growth over the past five years, with a CAGR of 6.1% over the period. Volumes are expected to continue to grow at the same pace until 2027.

Despite rapid growth, sparkling wine is still something of a niche market in Canada, representing just 5% of total wine volumes consumed in 2022. Sparkling wine's market share is forecast to increase to 7% in the next five years.

Population of sparkling wine drinkers

In million (LDA+ adults)



Total wine market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	50,716.15	47,972.75	-1.0%	-0.4%
Still Wine	46,285.85	43,764.75	-1.2%	-0.6%
Sparkling Wine	2,662.25	2,554.35	6.1%	4.3%
Other Wines	1,041.55	983.65	-3.2%	-2.8%
Fortified Wine	405.00	364.15	-7.0%	-4.6%
Light Aperitifs	321.50	305.85	-0.8%	0.2%

1 Statistics Canada estimates based on census data
2 Wine Intelligence online calibration study, September 2019 (n=1,000) Canadian adults 19+ years – Drinkers of at least one type of sparkling wine in the past 12 months
3 Wine Intelligence online calibration study, rolling average of May 2022 & April 2023, (n=2,020) Canadian adults 19+ years – Drinkers of at least one type of sparkling wine in the past 12 months
4 Wine Intelligence, Vinitrac® Canada, May 2019 and May 2023 (n≥1,000) drinkers of sparkling wine in Canada
IWSR, July 2023

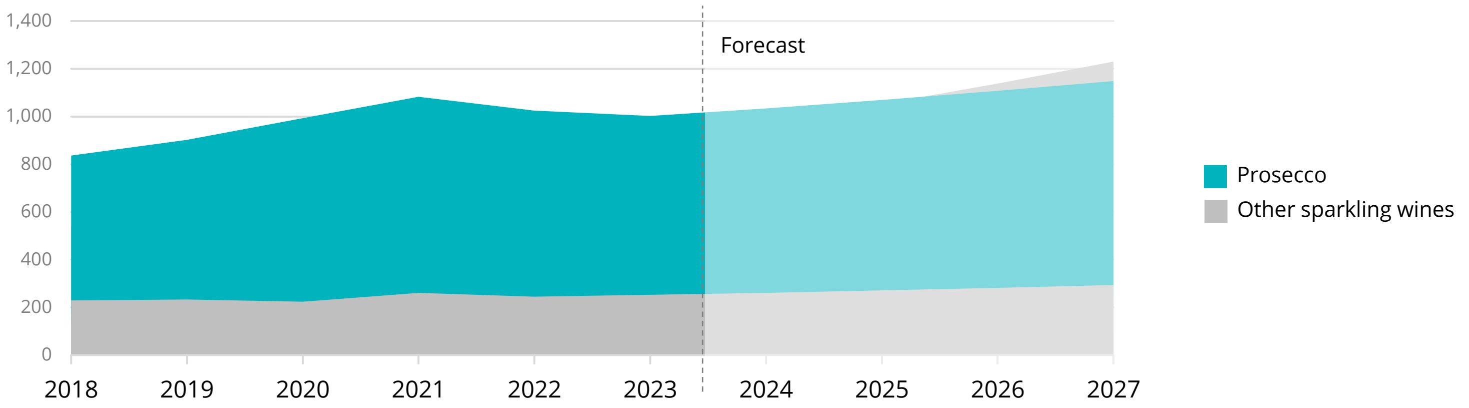
2. Prosecco leads in volume, but its popularity flattens

Italian sparkling wine leads by volume, with 40% of total market share. Prosecco makes up 85% of Italian sparkling wine volumes, and has the best conversion rate, with 75% of those who are aware of it becoming drinkers.

Though a mainstream product, Prosecco's popularity is not as strong as it used to be. Image perception for Prosecco is mostly on the decline. There have been significant decreases in some positive association, including 'popular with my friends' and 'fashionable', but also statements relating to its intrinsic qualities such as taste. However, Prosecco remains the favourite sparkling wine for a party.

Prosecco volumes vs other sparkling wines

000s 9-litre cases



Prosecco imagery perception

% who associate Prosecco with the following statements
Base = Those who have drunk Prosecco in the past 12 months

Ranking '23		2019	2023	Tracking
1	A good drink for celebrations	55%	50%	➡
2	I really like the taste	57%	49%	-8ppt ⬇
3	Perfect for a party	53%	46%	-7ppt ⬇
4=	Good value for money	39%	40%	➡
4=	A refreshing drink	48%	40%	-8ppt ⬇
5	High quality	37%	34%	➡
6	A sophisticated drink	34%	32%	➡
7	A good drink for informal social situations	31%	30%	➡
8	Popular with my friends	40%	31%	-8ppt ⬇
9	Fashionable	39%	28%	-11ppt ⬇
10	Traditionally made	26%	21%	➡
11	Makes a good impression on others	25%	25%	➡

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

Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada; IWSR, July 2023

3. Champagne still strong but losing momentum

Champagne has the most positive associations in sparkling wine, conveying an image of superior quality, tradition and sophistication.

Despite its strong and unique position in the market, Champagne has registered decreases in recorded sales and in consumption incidence among drinkers.

Champagne sales skyrocketed during the pandemic, but it posted a volume decline in 2022 for the first time in three years. It ranks fourth for recalled consumption among survey participants, but its incidence has dropped significantly compared with 2019. Just over one in four said they have drunk Champagne in the past 12 months, against 37% in 2019.

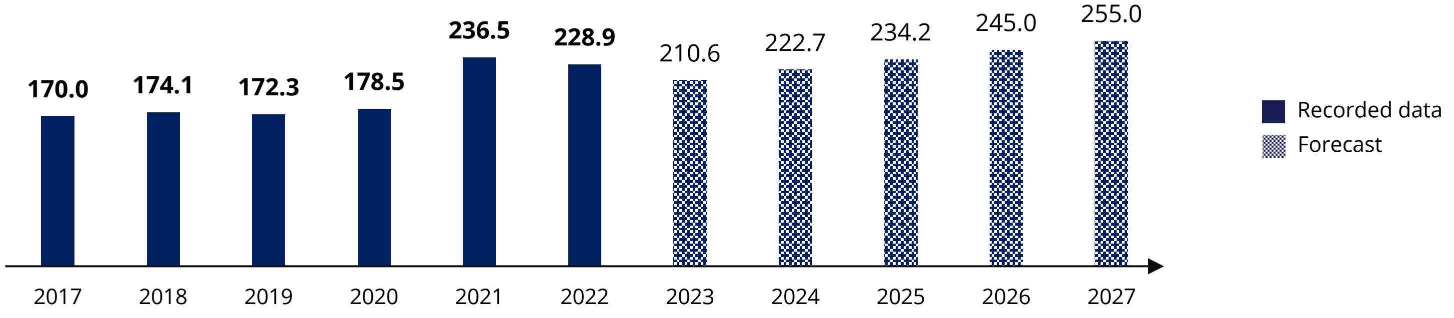
Champagne imagery perception

% who associate Champagne with the following statements vs average for all sparkling wine types tested
Base = Those who have drunk Champagne and the other sparkling wine types tested in the past 12 months

	2023	Market average	ppt difference
High quality	**54%**	35%	**19**
Traditionally made	**42%**	24%	**18**
A sophisticated drink	**48%**	30%	**18**
Makes a good impression on others	**36%**	22%	**14**
Fashionable	**33%**	25%	**9**
A good drink for celebrations	**46%**	44%	**2**
Popular with my friends	**28%**	26%	**2**
I really like the taste	**44%**	43%	**1**
Perfect for a party	**36%**	39%	**-3**
A refreshing drink	**31%**	36%	**-5**
A good drink for informal social situations	**22%**	30%	**-8**
Good value for money	**25%**	37%	**-12**
Total level of association	**448ppt**	394ppt	

Champagne volumes

000s 9-litre cases



Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada; IWSR, July 2023

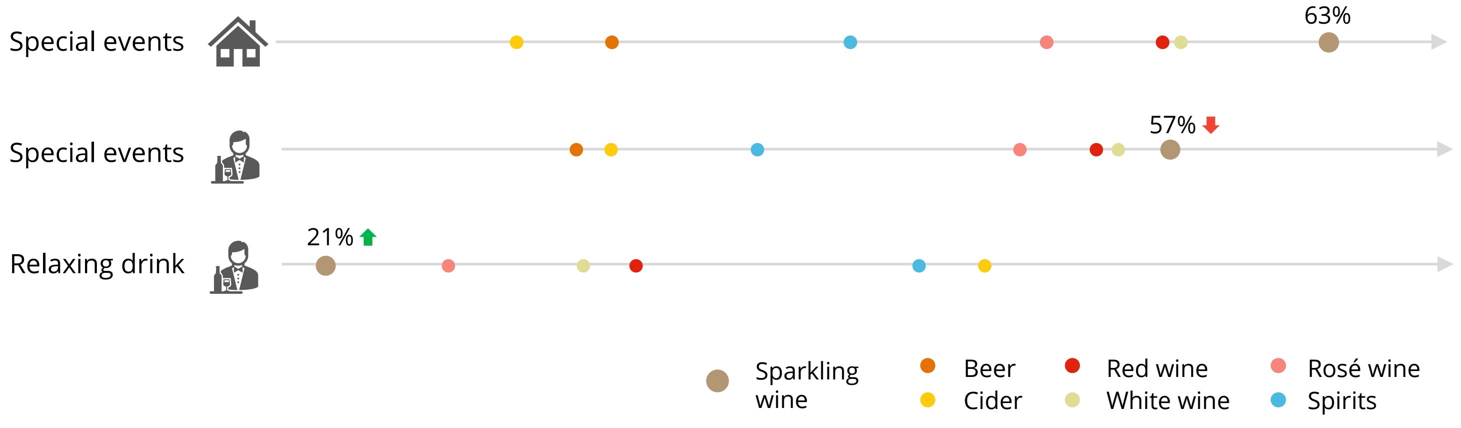
4. Consumption patterns and occasions change

Sparkling wine has traditionally been the beverage of choice for special occasions, inside or outside the home. However, this is changing, and sparkling wine is increasingly perceived as a drink to enjoy at the end of the day to relax, indicating a shift towards more casual consumption.

Sparkling wine consumption frequency is higher than in 2019, but it remains an occasional indulgence for most Canadian drinkers. Differences in consumption frequency are seen between genders and age groups, with younger men showing a higher propensity for frequent consumption.

Beverage suitability

% who would consider drinking the following beverages on the following occasions
Base = Those who have drunk the following beverages in the past 12 months



Consumption frequency: Tracking

% who drink sparkling wine at the stated frequencies
Base = All drinkers of sparkling wine (n≥1,008)

	2019	2023	Tracking
At least once a week	16%	21%	⬆
1-3 times a month	32%	32%	➡
Less than once a month	51%	47%	⬇

35% of 19–34 male drinkers consume sparkling wine weekly

⬆/⬇: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada; IWSR, July 2023

5. Strong brand reliance and consumer loyalty

Brand awareness and recommendations from friends or family are crucial factors influencing consumer choices.

Despite a general decline in awareness compared with 2019, most sparkling wine brands have maintained a stable performance in all key health metrics: conversion/purchase, consideration, affinity and recommendation. New World giants Yellow Tail and Jacob’s Creek continue to lead the market.

This demonstrates market stability and consumer loyalty to established brands.

Sparkling wine choice cues

Factors elected to be the most important when buying sparkling wine in the off-trade

#1 A brand I am aware of

#2 Recommendations by friends or family

#3 Promotional offer

Brand Power Index 2023

Top 10 brands in the market based on key health metrics

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Yellow Tail	93.3	=	3.2
2	Jacob's Creek	92.0	=	-0.7
3	Martini	82.5	=	5.0
4	Moët & Chandon	82.3	=	-2.8
5	Henkell	81.3	↑ +2	-8.1
6	Dom Pérignon	78.9	↓ -1	-4.4
7	Barefoot Bubbly	74.4	↓ -1	0.0
8	Veuve Clicquot	71.5	=	-3.5
9	Freixenet	68.0	↑ +2	-8.2
10	Baby Duck	66.7	=	-1.3

= Represents equal rankings

↑ / ↓: Ranking higher / lower than the previous wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Management Summary

Top sparkling wine types

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

	2019	2023	Tracking
Pink or Rosé sparkling wine or Champagne	n/a	46%	n/a
Prosecco	39%	39%	→
Other sparkling wine from Canada	37%	28%	↓
Champagne from France	34%	27%	↓
Sparkling wine from the USA	27%	23%	↓

Top alcoholic beverages (other than sparkling)

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

	2019	2023	Tracking
Red wine	76%	72%	→
White wine	77%	72%	↓
Beer	68%	61%	↓
Rosé wine	48%	53%	↑
Vodka	51%	47%	→

Most-known sparkling wine brands

% who have heard the following brands

	2019	2023	Tracking
Dom Pérignon	56%	48%	↓
Martini	48%	45%	→
Jacob's Creek	42%	44%	→
Yellow Tail	48%	43%	↓
Moët & Chandon	47%	42%	↓

Top sparkling wine brands by purchase

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

	2019	2023	Tracking
Yellow Tail	23%	16%	↓
Jacob's Creek	15%	16%	→
Martini	16%	14%	→
Henkell	12%	12%	→
Moët & Chandon	13%	9%	↓

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

Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Market Data

Sparkling wine in the Canadian market

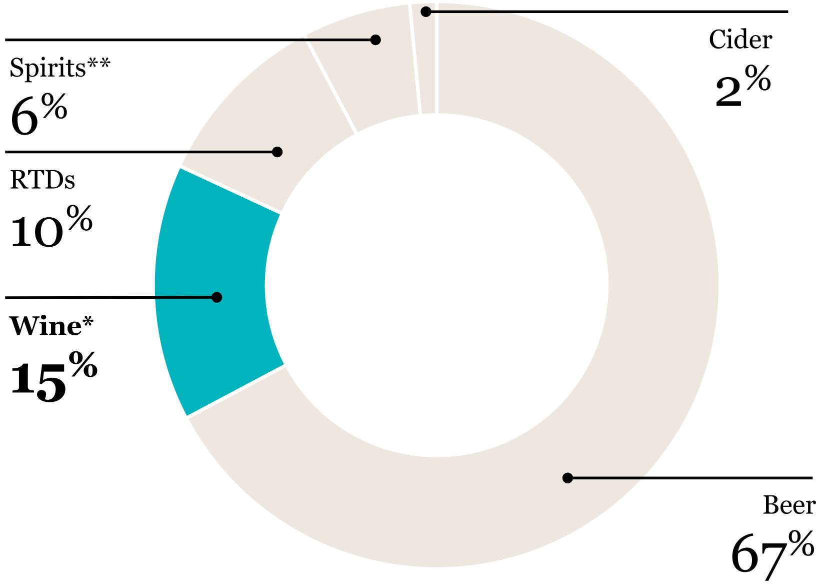
2023

Total beverage alcohol market

Beer dominates the Canadian market, with about two-thirds of total beverage alcohol volume, though it is losing share; wine volume is also declining, while RTDs and spirits grow

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	338,211.84	327,014.74	0.3%	-0.6%
Beer	227,327.78	219,880.33	-1.4%	-1.5%
Wine *	50,716.15	47,972.75	-1.0%	-0.4%
RTDs	34,541.30	33,812.75	22.0%	3.8%
Spirits **	20,307.17	20,366.35	2.2%	1.3%
Cider	5,319.44	4,982.56	-0.9%	-1.0%

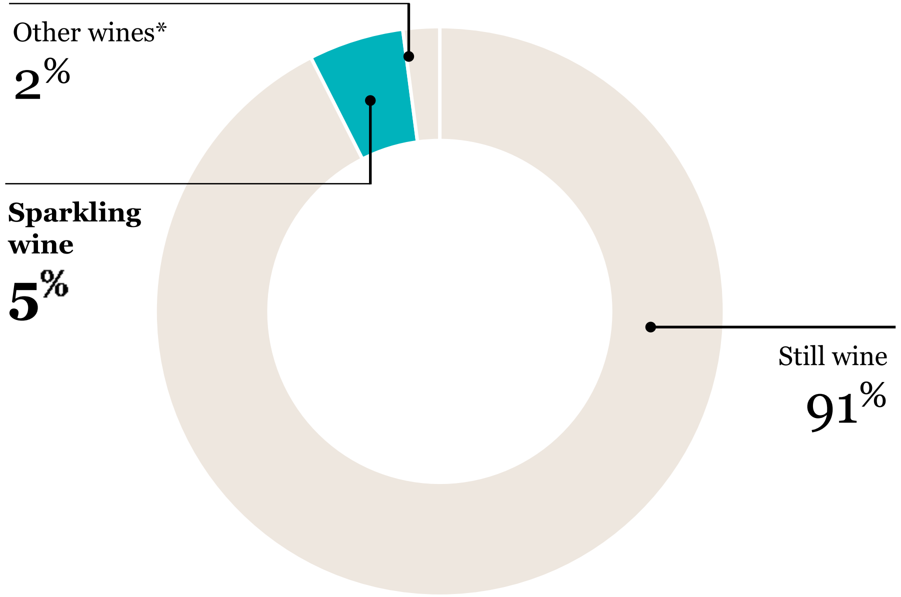
* Wine includes still wine, sparkling wine, fortified wine and light aperitifs
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits
Source: IWSR, July 2023

Total wine market

Still wine leads the wine market in volume but has suffered a fall, while sparkling wine has been increasing at a CAGR of over 6% in the past five years

Total wine market share by category**

% of purchases that fall within the categories below



Total wine market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	50,716.15	47,972.75	-1.0%	-0.4%
Still Wine	46,285.85	43,764.75	-1.2%	-0.6%
Sparkling Wine	2,662.25	2,554.35	6.1%	4.3%
Other Wines *	1,041.55	983.65	-3.2%	-2.8%
Fortified Wine **	405.00	364.15	-7.0%	-4.6%
Light Aperitifs	321.50	305.85	-0.8%	0.2%

*Other Wines includes non-grape based wines

** Fortified wine and Light aperitifs omitted from pie chart due to small market share (<1%)

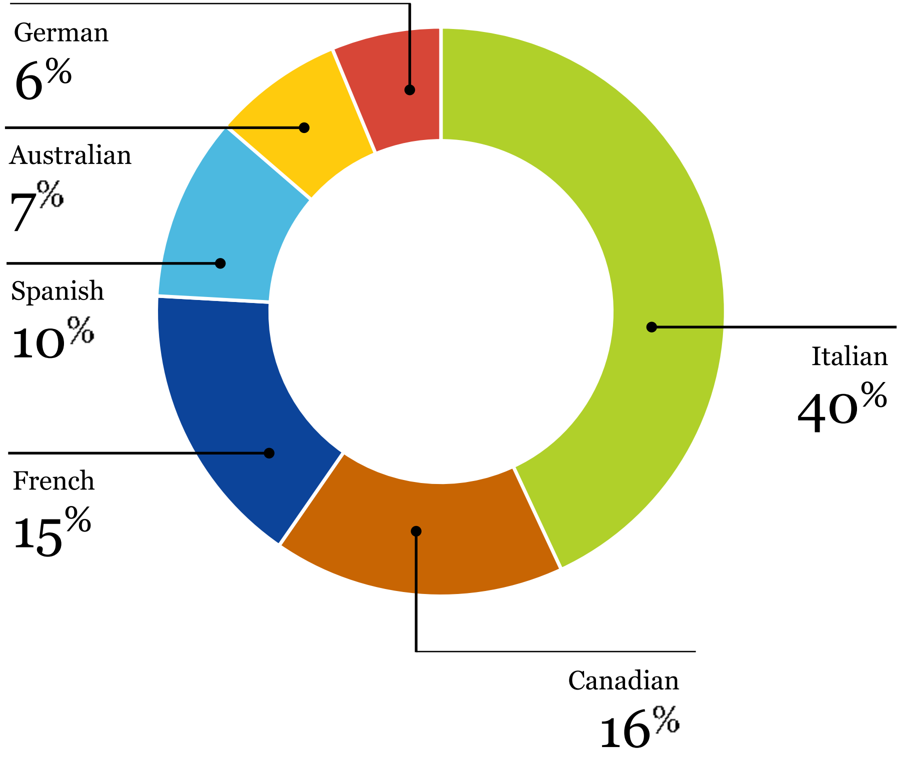
Source: IWSR, July 2023

Sparkling wine volumes by origin

Italian sparkling wine leads the market by volume and has registered the biggest increase of any country of origin over the past five years; it is forecast to continue to grow, though at a slightly slower rate

Sparkling wine market share by origin**

% of purchases that fall within the origin below



Sparkling wine volumes by origin

000s 9-litre cases

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

** Other origins omitted from pie chart due to small market share (<5%)

Source: IWSR, July 2023

Sparkling wine retail price by origin

Sparkling wine sells at an average of US$16.40; French fizz is significantly more expensive than that of other origins, driven by Champagne

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
	Average	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%

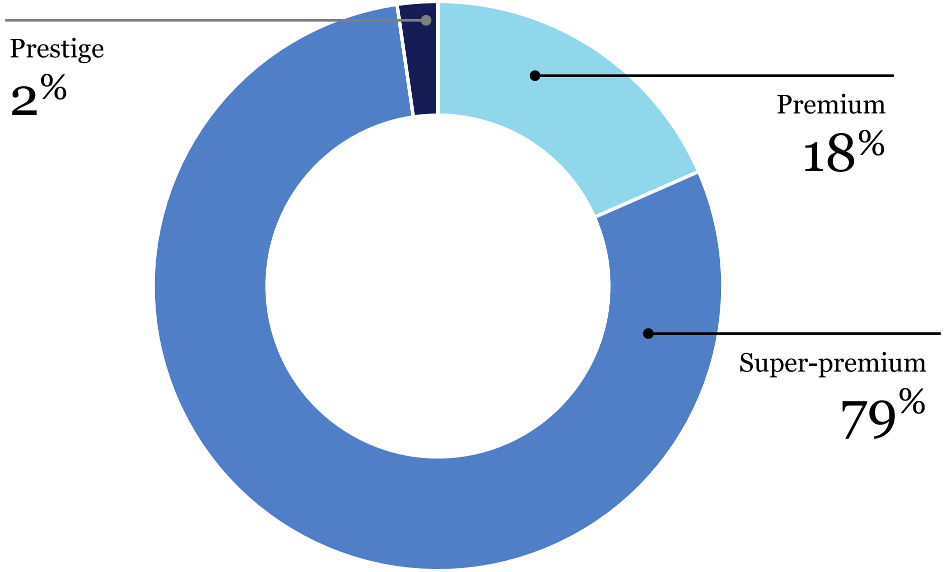
Source: IWSR, July 2023

Champagne by price band

Champagne mostly relies on volumes in the super-premium price band; there has been significant growth in the past five years which is expected to continue, though at a slower rate

Champagne market share by price band*

% of purchases that fall within the categories below



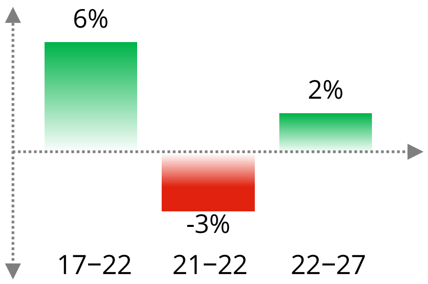
Champagne volumes by price band

000s 9-litre cases, prices for 75cl bottles equivalent

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

Total Champagne volume change

Compound Annual Growth Rate (CAGR), in %



Other sparkling wine data available on the next slide

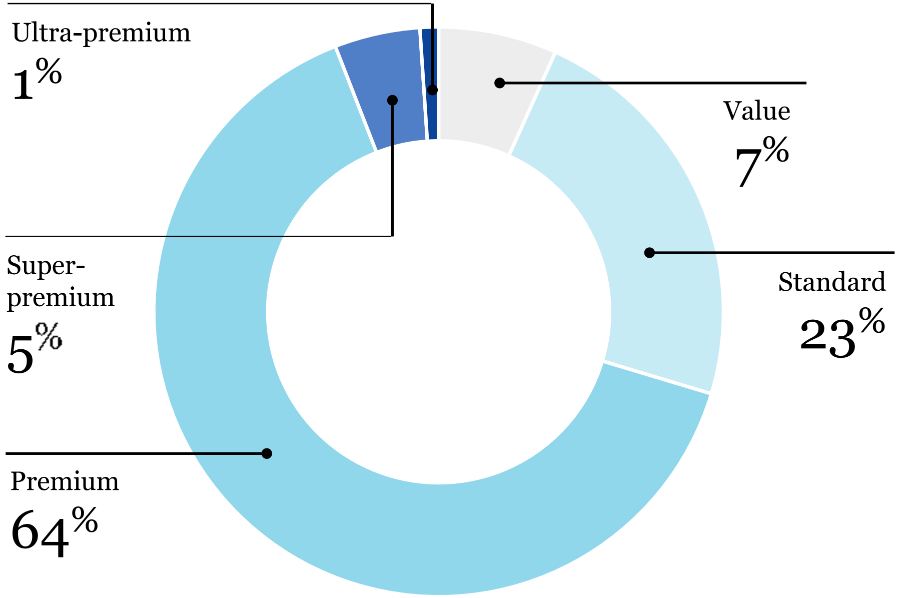
*Prestige Plus omitted from pie chart due to small market share (<1%)
Source: IWSR, July 2023

Other sparkling wine by price band

Most non-Champagne sparkling wine sells in the premium segment; the highest price bands have registered the biggest volume increases over the past five years

Sparkling wine market share by price band*

% of purchases that fall within the categories below



Sparkling wine volumes by price band

000s 9-litre cases, prices for 75cl bottles equivalent

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (CAD 3.00 to 7.99)	168.10	156.50	7.9%	-2.0%
Standard (CAD 8.00 to 14.99)	640.25	532.95	-1.4%	-0.8%
Premium (CAD 15.00 to 22.99)	1,479.70	1,498.65	9.0%	6.3%
Super Premium (CAD 23.00 to 32.99)	110.50	112.95	13.1%	11.3%
Ultra Premium (CAD 33.00 to 58.99)	27.20	24.45	15.8%	-0.3%

Champagne data available on the previous slide

*Prestige omitted from pie chart due to small market share (<1%)
Source: IWSR, July 2023

Sparkling wine consumption per capita

Per capita consumption of sparkling wine in Canada has increased above the average rate of the top 20 markets over the last five years. However, there was a slight decrease in 2022

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.47	13.58	8.4%	9.2%
2	St. Martin and St. Maarten	6.29	8.34	2.5%	33.5%
3	Italy	7.87	7.38	-1.2%	-6.2%
4	Turks and Caicos	5.27	6.50	-0.2%	26.0%
5	Germany	5.31	5.51	-1.2%	3.5%
6	Lithuania	4.88	5.06	6.1%	2.5%
7	Latvia	4.47	4.89	1.4%	8.2%
8	France	4.73	4.86	-0.8%	3.1%
9	Guadeloupe	4.17	4.81	-1.3%	16.0%
10	Martinique	4.22	4.43	-4.2%	5.3%
11	Estonia	4.08	4.34	3.3%	5.6%
12	Belgium and Luxembourg	4.28	4.27	-0.8%	0.5%
13	Austria	3.44	3.54	0.6%	3.2%
14	Switzerland	3.23	3.33	1.5%	3.6%
15	Cayman Islands	3.13	3.31	4.2%	7.9%
16	Sweden	3.28	3.30	7.8%	1.1%
17=	United Kingdom	3.16	3.01	0.4%	-4.2%
17=	Slovenia	2.89	3.01	3.0%	4.0%
19	New Zealand	3.13	2.94	-0.1%	-4.8%
20	Reunion	2.55	2.93	1.1%	15.2%
55=	Canada	0.78	0.74	6.1%	-4.1%

Source: IWSR, July 2023

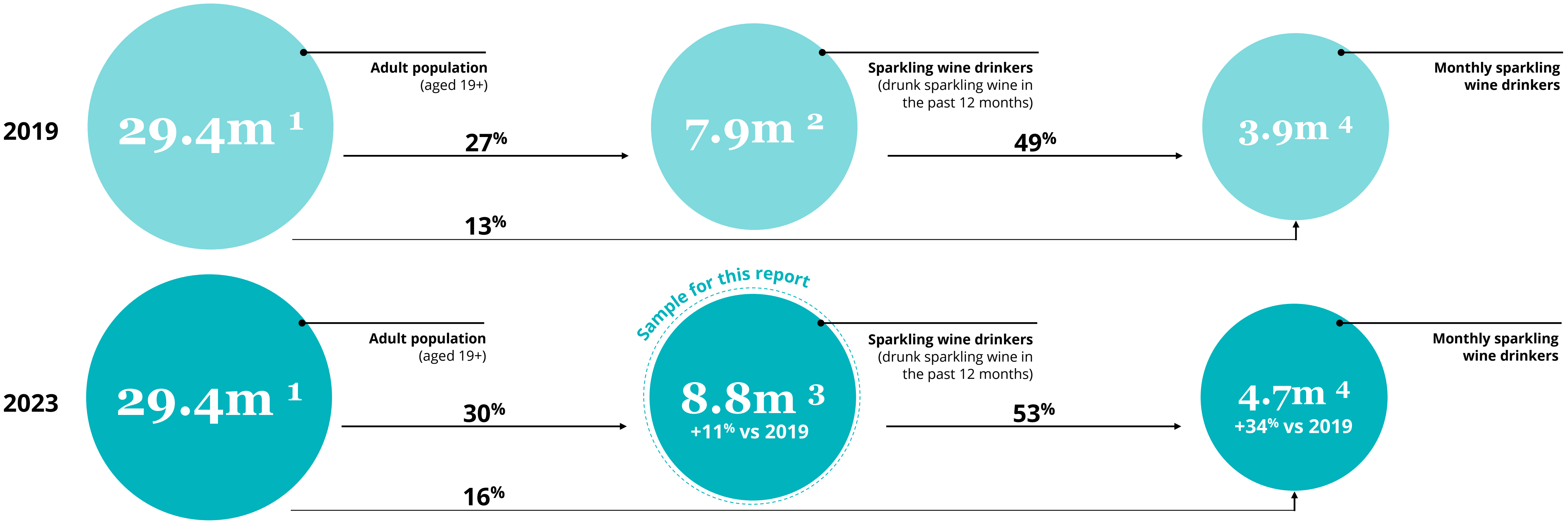
Market Demographics

Sparkling wine in the Canadian market

2023

Canadian sparkling wine drinkers

A surge in the population of sparkling wine drinkers reflects the growing popularity of the category



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4 Wine Intelligence, Vinitrac® Canada, May 2019 and May 2023 (n≥1,000) drinkers of sparkling wine in Canada

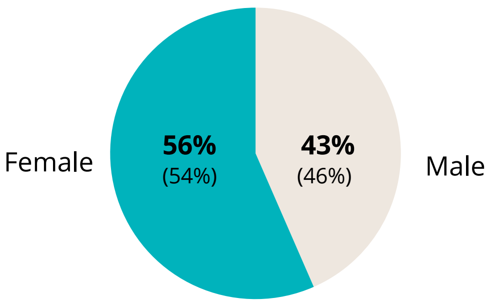
Demographics

The demographics of sparkling wine drinkers in Canada have remained broadly stable since 2019. There has been significant growth in the $100,000-plus income bracket, those earners now representing a third of Canadian sparkling wine drinkers

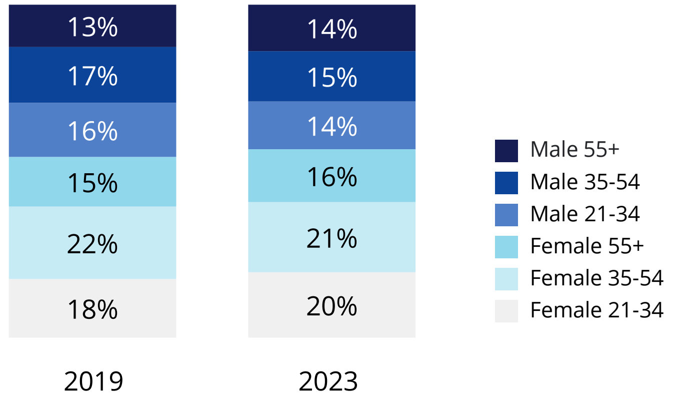
Sparkling wine drinkers, who are they?

All drinkers of sparkling wine in Canada in 2023 compared with 2019

Gender



Age

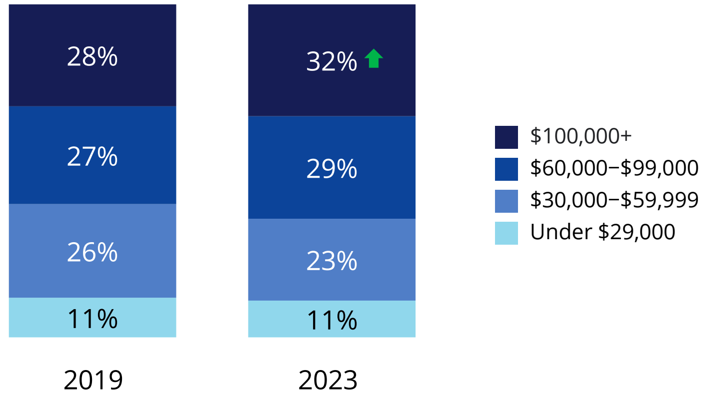


Geographics

Provinces	2019	2023	Tracking
Quebec	24%	27%	→
Ontario	40%	38%	→
West	30%	30%	→
Other Provinces	5%	6%	→

Language	2019	2023	Tracking
English-speaking	76%	73%	→
French-speaking	24%	27%	→

Income*



* "Prefer not to say" not charted

(Data in brackets: 2019 data)

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

Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Drinking Repertoire

Sparkling wine in the Canadian market

2023

Drinking repertoire

Beer and vodka are the most frequently consumed alcoholic drinks among sparkling wine drinkers, after still wine.

White wine has seen a decline since 2019, but rosé has improved its consumption incidence.

RTDs are more popular than cocktails or craft beer and appear broadly stable, consumed by a third of drinkers. Cocktails are making a comeback after falling immediately after the pandemic. Craft beer is in decline.

Other alcoholic beverage repertoire: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
1=	Red wine	76%	72%	72%	→	→
1=	White wine	77%	72%	72%	↓	→
3	Beer	68%	58%	61%	↓	→
4	Rosé wine	48%	47%	53%	↑	↑
5	Vodka	51%	44%	47%	→	→
6	Whisky / Whiskey	40%	34%	36%	↓	→
7	Rum	41%	33%	35%	↓	→
8	Pre-mixed / ready to drink alcoholic beverages	29%	30%	33%	→	→
9=	Cocktails	32%	24%	32%	→	↑
9=	Craft beer	39%	31%	32%	↓	→
11	Cider	29%	24%	26%	→	→
12	Liqueurs	25%	25%	25%	→	→
13	Gin	25%	24%	24%	→	→
14	Sweet / dessert wine	21%	18%	17%	↓	→
15	Brandy / Cognac	15%	15%	15%	→	→
16	Port	13%	12%	11%	→	→
17	Sherry	8%	11%	8%	→	↓

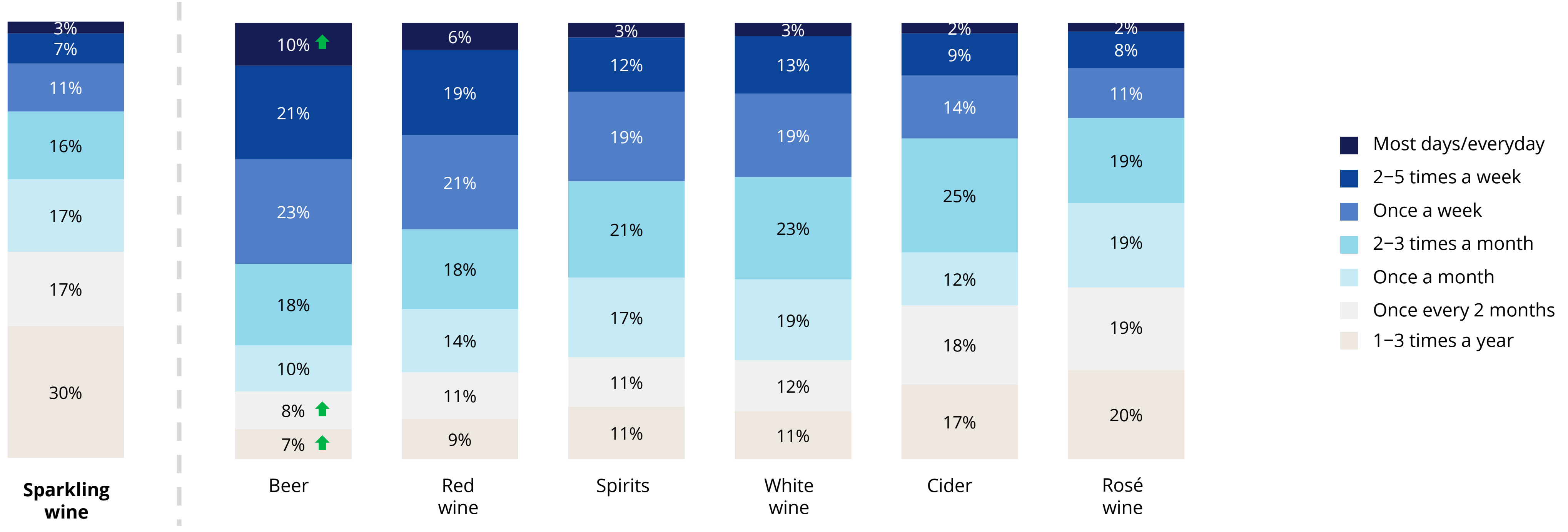
= Represents equal ranking, n/a: beverage type not tested during this wave
↑/↓: Statistically significantly higher / lower than previous waves at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Consumption frequency

Sparkling wine is a more occasional drink than other categories, with most of its consumers drinking it fewer than a couple of times a months, a similar level to 2019

Consumption frequency: sparkling wine and other alcoholic beverages

% who drink the following beverages at the stated frequencies
Base = Those who have drunk the following beverages in the past 12 months



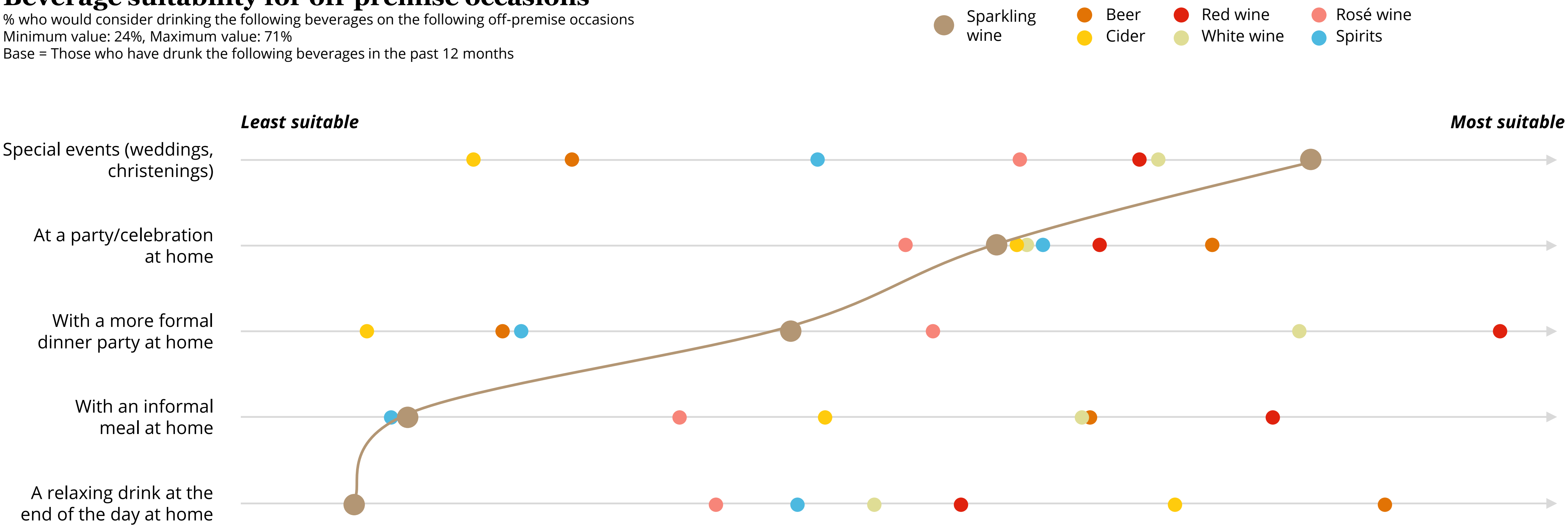
⬆/⬇: Statistically significantly higher / lower than May 2019 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Alcoholic beverage suitability (1/2)

Sparkling wine is the beverage of choice for special events and is seen as well-suited to parties

Beverage suitability for off-premise occasions

% who would consider drinking the following beverages on the following off-premise occasions
Minimum value: 24%, Maximum value: 71%
Base = Those who have drunk the following beverages in the past 12 months



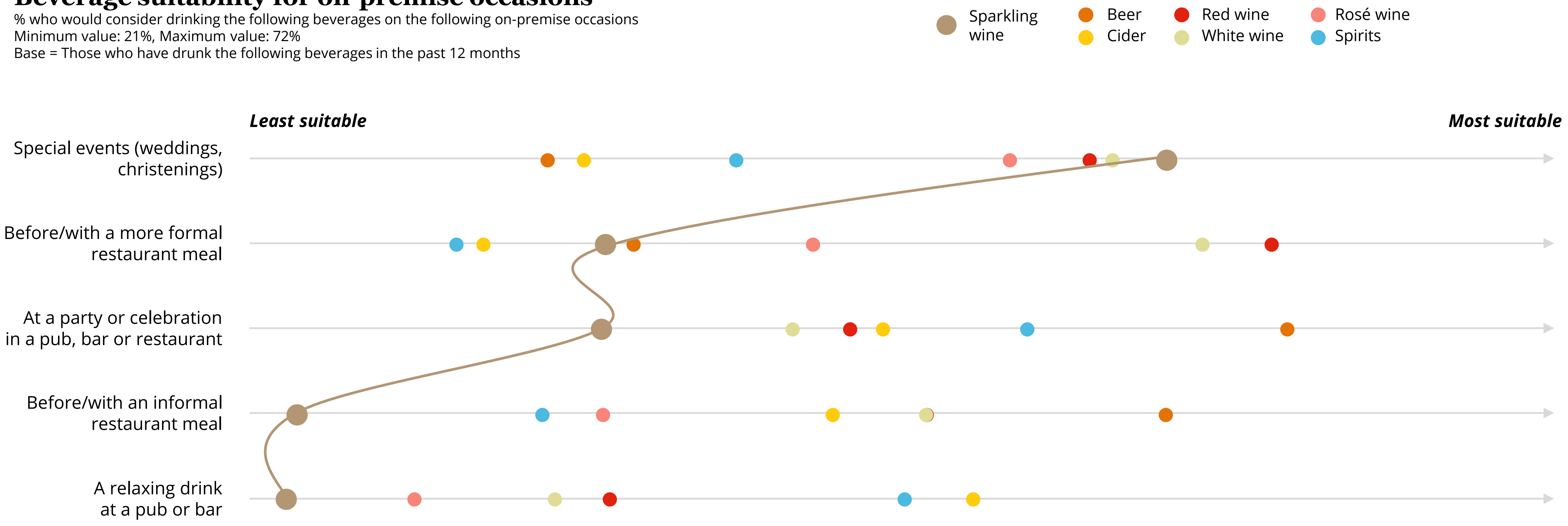
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Alcoholic beverage suitability (2/2)

Special events top the rankings of the most suitable on-premise occasions for sparkling wine

Beverage suitability for on-premise occasions

% who would consider drinking the following beverages on the following on-premise occasions
Minimum value: 21%, Maximum value: 72%
Base = Those who have drunk the following beverages in the past 12 months



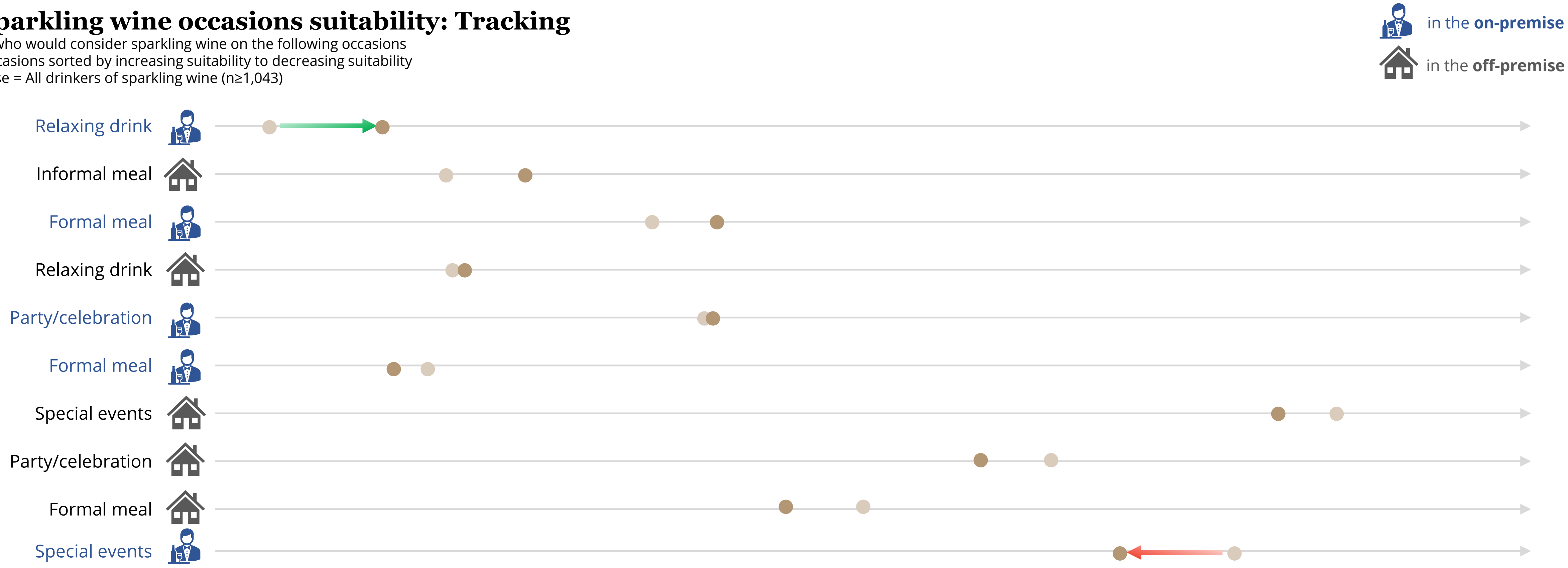
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Sparkling wine suitability

The perceived suitable occasions for sparkling wine are mostly in line with before pandemic, though it is increasingly seen as suitable for relaxing at the end of the day and less for special on-premise events

Sparkling wine occasions suitability: Tracking

% who would consider sparkling wine on the following occasions
Occasions sorted by increasing suitability to decreasing suitability
Base = All drinkers of sparkling wine (n≥1,043)



: 2019, : 2023
→ / ←: Statistically significantly higher / lower than 2019 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Consumption Behaviour

Sparkling wine in the Canadian market

2023

Consumption frequency

Consumption frequency for sparkling wine picked up in 2022 but this seems to be fading, with a return towards 2019 levels; however, weekly consumption is still significantly higher than four years ago

Consumption frequency of sparkling wine: Tracking

% who drink sparkling wine at the stated frequencies
Base = All drinkers of sparkling wine (n≥1,000)

	2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
Most days / every day	**2%**	**4%**	**3%**	➡	➡
2-5 times a week	**5%**	**10%**	**7%**	➡	⬇
Once a week	**10%**	**12%**	**11%**	➡	➡
2-3 times a month	**15%**	**17%**	**16%**	➡	➡
Once a month	**17%**	**16%**	**17%**	➡	➡
Once every two months	**19%**	**15%**	**17%**	➡	➡
1-3 times a year	**32%**	**27%**	**30%**	➡	➡

21% consume sparkling wine on a weekly basis (⬆ vs 16% in 2019)

⬆ / ⬇: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Consumption frequency

There is a contrast in consumption frequency between genders and age groups; younger men are more likely to consume sparkling wine frequently

Consumption frequency of sparkling wine, by gender x age

% who drink sparkling wine at the stated frequencies
Base = All drinkers of sparkling wine (n=1,209)

	All drinkers of sparkling wine in Canada	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=1,209)	(n=173)	(n=182)	(n=168)	(n=236)	(n=254)	(n=191)
Most days / every day	3%	5%	3%	1%	5%	2%	0%
2-5 times a week	7%	16%	11%	4%	5%	5%	3%
Once a week	11%	13%	17%	6%	13%	8%	8%
2-3 times a month	16%	18%	13%	9%	20%	19%	12%
Once a month	17%	17%	15%	17%	17%	17%	17%
Once every two months	17%	10%	16%	21%	19%	17%	18%
1-3 times a year	30%	19%	25%	43%	22%	32%	42%

35% of 19–34 male drinkers consume sparkling wine weekly

% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Sparkling wine types consumption and awareness

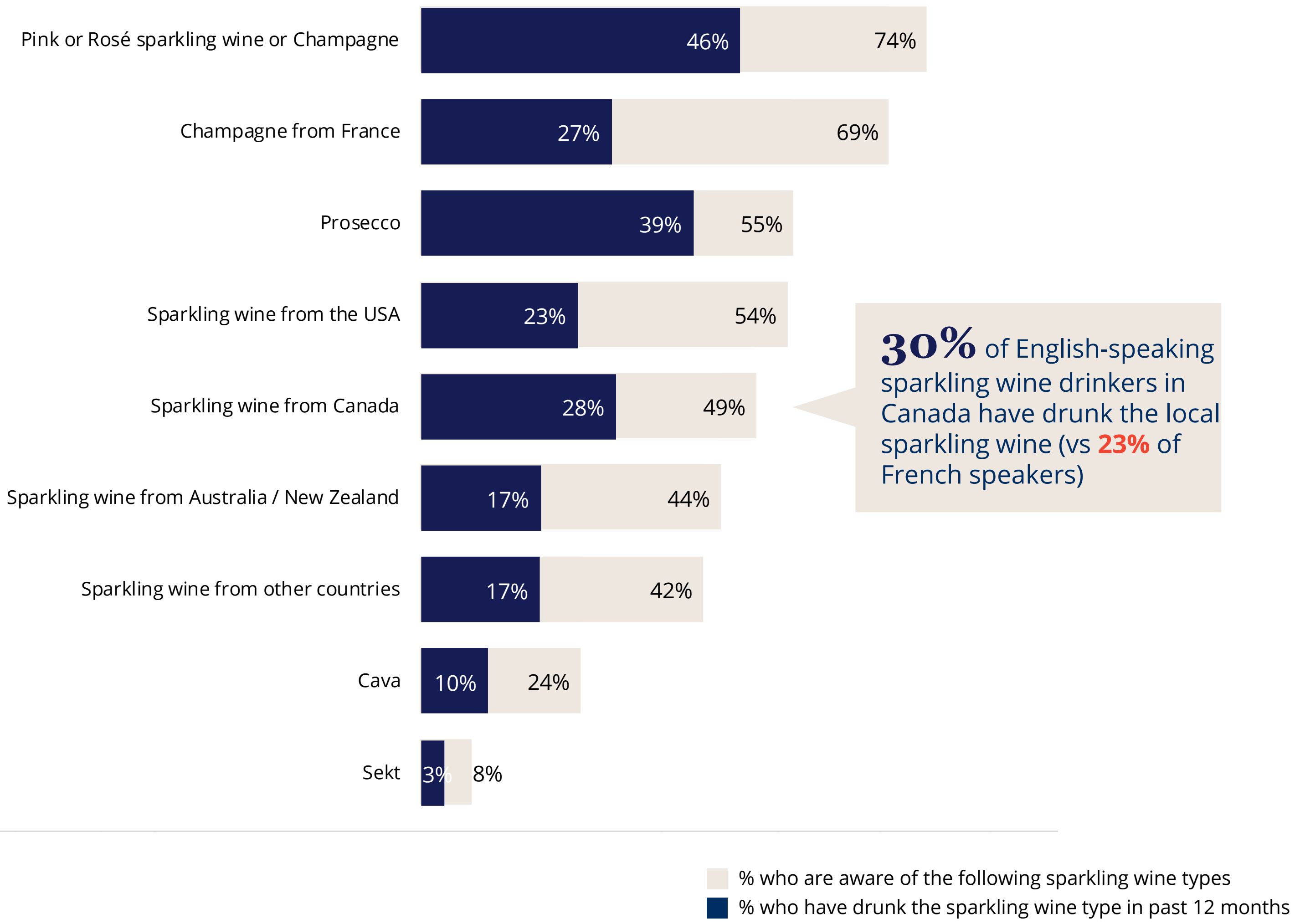
Rosé sparkling wine is most popular, ranking first in awareness and purchase incidence.

Prosecco has the highest conversion rate, with those who are aware of it highly likely to have bought it at least once in the past 12 months.

Only about half of the sparkling wine population know that Canada produces its own sparkling wine, and just one in four have drunk it in the past year.

Sparkling wine types awareness and consumption

% who have heard of the sparkling wine type and % who have drunk the sparkling wine type in past 12 months
Base = All drinkers of sparkling wine (n=1,209)



30% of English-speaking sparkling wine drinkers in Canada have drunk the local sparkling wine (vs **23%** of French speakers)

%/%: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Sparkling wine types awareness

There has been a significant drop in awareness of Champagne since 2019, but it seems to be bouncing back. A smaller proportion of sparkling wine drinkers know about Canadian sparkling wine production than four years ago.

Sparkling wine awareness: Tracking

% who are aware of the following sparkling wine types
Base = All drinkers of sparkling wine (n≥1,008)

	2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
Pink or Rosé sparkling wine or Champagne	**n/a**	**67%**	**74%**	n/a	↑
Champagne *(from France)*	**74%**	**64%**	**69%**	↓	↑
Prosecco	**58%**	**51%**	**55%**	→	→
Sparkling wine from the USA	**58%**	**55%**	**54%**	→	→
Sparkling wine from Canada	**56%**	**49%**	**49%**	↓	→
Sparkling wine from Australia / New Zealand	**48%**	**44%**	**44%**	→	→
Sparkling wine from other countries	**46%**	**37%**	**42%**	↓	↑
Cava	**24%**	**24%**	**24%**	→	→
Sekt	**8%**	**8%**	**8%**	→	→

n/a: the sparkling wine type has not been tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Sparkling wine types awareness

Younger men are the least knowledgeable about sparkling wine types

Sparkling wine type awareness, by age and gender

% who are aware of the following sparkling wine types
Base = All drinkers of sparkling wine (n=1,209)

	All drinkers of sparkling wine in Canada	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=1,209)	(n=173)	(n=182)	(n=168)	(n=236)	(n=254)	(n=191)
Pink or Rosé sparkling wine or Champagne	**74%**	**62%**	**69%**	**74%**	**79%**	**81%**	**78%**
Champagne *(from France)*	**69%**	**60%**	**76%**	**76%**	**66%**	**65%**	**75%**
Prosecco	**55%**	**46%**	**49%**	**51%**	**58%**	**61%**	**60%**
Sparkling wine from the USA	**54%**	**43%**	**65%**	**61%**	**50%**	**52%**	**55%**
Sparkling wine from Canada	**49%**	**36%**	**52%**	**54%**	**47%**	**49%**	**59%**
Sparkling wine from Australia / New Zealand	**44%**	**40%**	**53%**	**43%**	**38%**	**45%**	**47%**
Sparkling wine from other countries	**42%**	**29%**	**44%**	**49%**	**40%**	**43%**	**45%**
Cava	**24%**	**26%**	**24%**	**27%**	**22%**	**22%**	**22%**
Sekt	**8%**	**16%**	**11%**	**6%**	**6%**	**5%**	**4%**

% / **%**: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Sparkling wine types consumption

There have been decreases in consumption incidence for several sparkling wine types since 2019, especially sparkling wine from North America and Champagne.

Sparkling wine consumption: Tracking

% who have drunk the sparkling wine type in past 12 months
Base = All drinkers of sparkling wine (n≥1,000)

	2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
Pink or Rosé sparkling wine or Champagne	n/a	43%	46%	n/a	➡
Prosecco	39%	33%	39%	➡	⬆
Sparkling wine from Canada	37%	30%	28%	⬇	➡
Champagne *(from France)*	34%	29%	27%	⬇	➡
Sparkling wine from the USA	27%	26%	23%	⬇	⬇
Sparkling wine from Australia / New Zealand	20%	19%	17%	➡	➡
Sparkling wine from other countries	21%	17%	17%	⬇	➡
Cava	11%	11%	10%	➡	➡
Sekt	3%	4%	3%	➡	➡

n/a: the sparkling wine type has not been tested during this wave
⬆ / ⬇: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine types consumption

Men under 55 are most likely to have a wide repertoire of sparkling wines; women are more likely to drink rosé sparkling wine, while men favour Champagne or sparkling wine from Australia and New Zealand

Sparkling wine type consumption, by age and gender

% who have drunk the sparkling wine type in past 12 months
Base = All drinkers of sparkling wine (n=1,209)

	All drinkers of sparkling wine in Canada	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=1,209)	(n=173)	(n=182)	(n=168)	(n=236)	(n=254)	(n=191)
Pink or Rosé sparkling wine or Champagne	46%	46%	35%	30%	58%	59%	37%
Prosecco	39%	33%	36%	33%	44%	41%	44%
Sparkling wine from Canada	28%	22%	30%	30%	27%	27%	33%
Champagne *(from France)*	27%	36%	38%	23%	29%	20%	22%
Sparkling wine from the USA	23%	24%	33%	17%	23%	24%	14%
Sparkling wine from Australia / New Zealand	17%	26%	27%	8%	14%	15%	16%
Sparkling wine from other countries	17%	16%	21%	16%	13%	18%	20%
Cava	10%	16%	7%	7%	11%	8%	9%
Sekt	3%	9%	5%	1%	3%	2%	1%

53% of women consume rosé sparkling wine (vs **37%** of men)

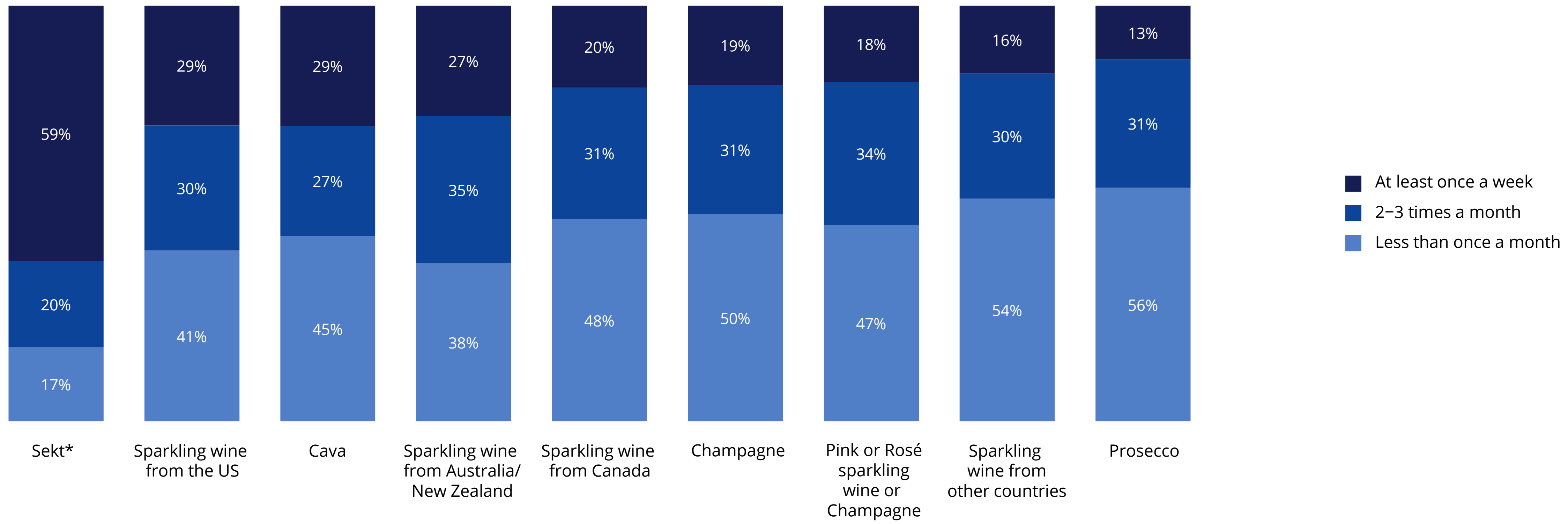
% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Consumption frequency

Cava and sparkling wine from the US, Australia and New Zealand are the most consumed types (disregarding Sekt, which has a small sample size), with just over one in four drinking them weekly

Consumption frequency: all sparkling wine types

% who drink the following sparkling wine types at the stated frequencies
Base = Those who have drunk the following sparkling wine types



* Please note the small sample size (n<50)

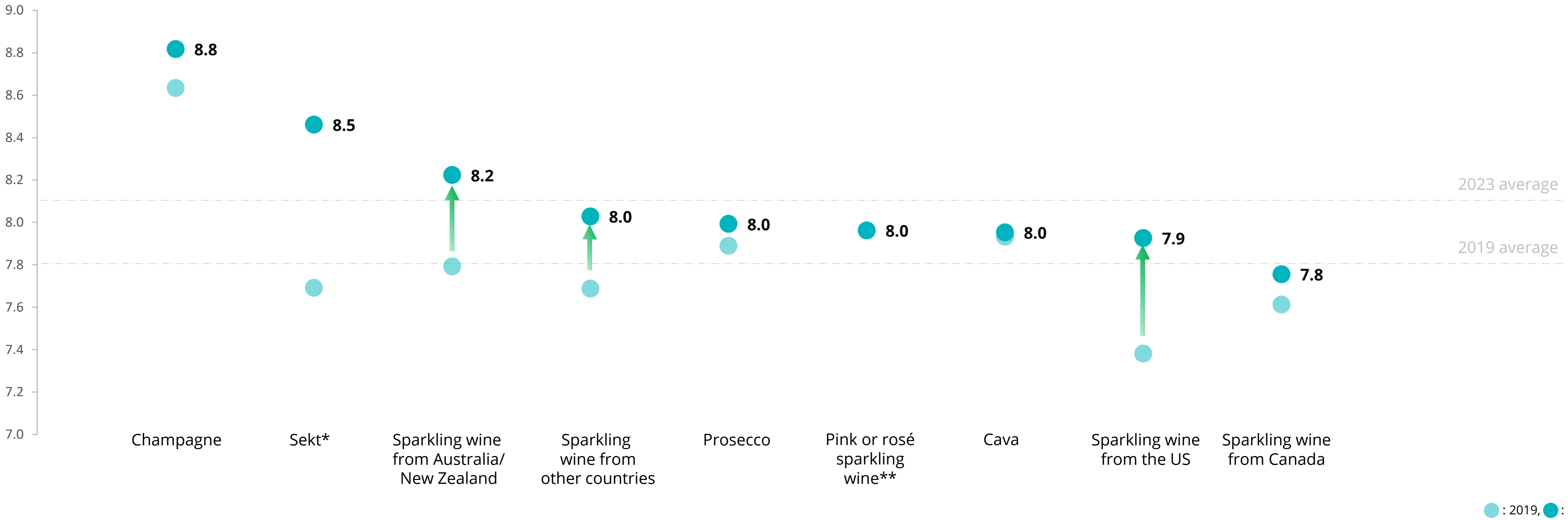
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Quality perception

Champagne is perceived as the highest quality in sparkling wine; some other types registered an increase in quality perceptions, including the New World

Quality perception: all sparkling wine types

Mean quality perception, participants indicated their view of the quality of the following sparkling wine types on a scale of 0 –10
Base = Those who have drunk the following sparkling wine types



* Please note the small sample size (n<50)
** No tracking available

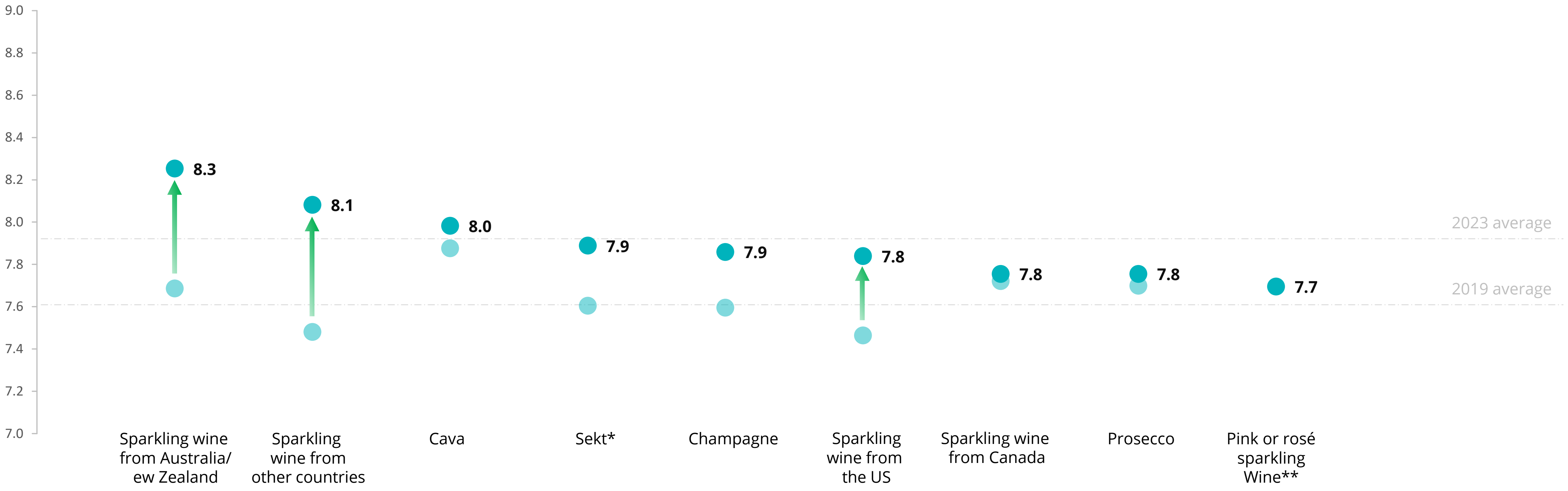
→ / ←: Statistically significantly higher / lower than 2019 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Value for money

Following perceived improvements in quality, the value for money rating of sparkling wines from Australia, New Zealand, the US and other origins has also improved significantly

Value for money perception: all sparkling wine types

Mean value for money perception, participants indicated their view of the value for money of the following sparkling wine types on a scale of 0–10
Base = Those who have drunk the following sparkling wine types



: 2019, : 2023

→ / ←: Statistically significantly higher / lower than 2019 at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

* Please note the small sample size (n<50)
** No tracking available

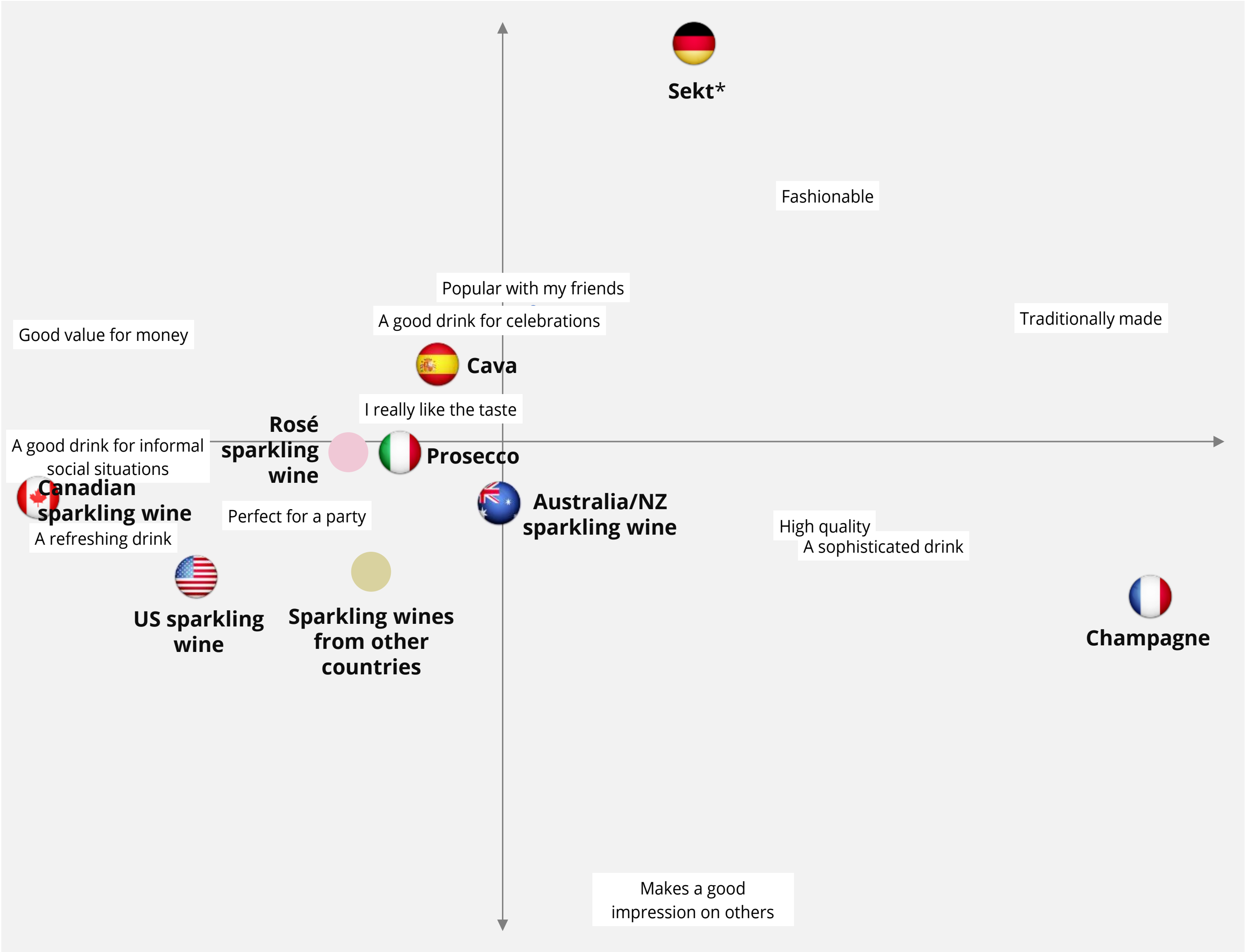
Imagery perception

The positioning map is a graphical representation of the association between wine-producing countries and statements. The strength of the association is measured by how far the wine-producing country and the statement are from the centre

There is little difference in imagery perception between most sparkling wine types. Only Champagne stands out on premium statements such as quality and sophistication.

Sparkling wine types imagery perception

Base = Those who have drunk the following sparkling wine types



* Please note the small sample size (n<50)

Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Imagery perception

Champagne scores the highest imagery association overall, in line with previous findings on quality perception; Canadian sparkling wine distinguishes itself on ‘refreshing’ and ‘good value for money’

Sparkling wine types imagery perception

Sparkling wine types sorted by level of association; statements sorted by average for all sparkling wine types
% who associate the sparkling wine types with the following statements
Base = Those who have drunk the following sparkling wine types

	Champagne	Prosecco	Pink or Rosé sparkling wine or Champagne	Sarkling wine from Canada	Cava	Sparkling wine from other countries	Sparkling wine from Australia / New Zealand	Sparkling wine from the USA	Sekt*
A good drink for celebrations	46%	50%	48%	44%	44%	41%	42%	38%	44%
I really like the taste	44%	49%	49%	44%	39%	49%	40%	37%	40%
Perfect for a party	36%	46%	47%	38%	38%	42%	35%	41%	29%
Good value for money	25%	40%	34%	46%	43%	39%	33%	38%	32%
A refreshing drink	31%	40%	40%	48%	34%	36%	36%	37%	25%
High quality	54%	34%	32%	31%	34%	36%	35%	29%	32%
A sophisticated drink	48%	32%	35%	24%	28%	30%	28%	23%	27%
A good drink for informal social situations	22%	30%	31%	37%	34%	29%	32%	32%	21%
Popular with my friends	28%	31%	29%	24%	23%	23%	28%	24%	27%
Fashionable	33%	28%	29%	19%	27%	18%	22%	19%	29%
Traditionally made	42%	21%	19%	19%	26%	21%	23%	19%	30%
Makes a good impression on others	36%	25%	23%	21%	21%	23%	21%	22%	10%

Green / turquoise: Statistically significantly higher than 3 or more / 2 sparkling wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

* Please note the small sample size (n<50)

Imagery perception

Overall imagery perception is either stable or in decline; parties and celebrations are less associated with sparkling wine than in 2019; there is reduced popularity for both Prosecco and Canadian sparkling wine

Sparkling wine types imagery perception: Tracking

Sparkling wine types sorted by level of association; statements sorted by average for all sparkling wine types
% who associate the sparkling wine types with the following statements
Base = Those who have drunk the following sparkling wine types

	Champagne	Prosecco	Pink or Rosé sparkling wine or Champagne	Sarkling wine from Canada	Cava	Sparkling wine from other countries	Sparkling wine from Australia / New Zealand	Sparkling wine from the USA	Sekt*
A good drink for celebrations	-10ppt ↓	→	n/a	-11ppt ↓	→	→	→	-13ppt ↓	→
I really like the taste	-10ppt ↓	-8ppt ↓	n/a	-8ppt ↓	→	→	-14ppt ↓	→	→
Perfect for a party	-12ppt ↓	-7ppt ↓	n/a	-8ppt ↓	→	→	-9ppt ↓	-7ppt ↓	→
Good value for money	→	→	n/a	-8ppt ↓	→	→	-13ppt ↓	→	→
A refreshing drink	→	-8ppt ↓	n/a	→	→	→	-10ppt ↓	→	→
High quality	→	→	n/a	→	→	→	→	→	→
A sophisticated drink	→	→	n/a	→	→	→	→	→	→
A good drink for informal social situations	→	→	n/a	→	→	→	→	-11ppt ↓	→
Popular with my friends	→	-8ppt ↓	n/a	-9ppt ↓	→	→	→	-11ppt ↓	→
Fashionable	→	-11ppt ↓	n/a	→	→	→	→	→	→
Traditionally made	→	→	n/a	→	→	→	→	→	→
Makes a good impression on others	→	→	n/a	→	→	→	→	→	-34ppt ↓

* Please note the small sample size (n<50)

% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Purchase Behaviour

Sparkling wine in the Canadian market

2023

Purchase locations

About 75% of sparkling wine drinkers purchase in the off-trade; rosé sparkling wine is more likely than other types to be consumed in a restaurant

Sparkling wine types purchase location

% who purchase sparkling wine in the following places
Base = Those who have drunk the following sparkling wine types

	Pink or Rosé sparkling wine or Champagne	Prosecco	Sparkling wine from Canada	Champagne	Sparkling wine from the USA	Sparkling wine from Australia / New Zealand	Sparkling wine from other countries	Cava	Sekt*
In a store	77%	78%	80%	75%	77%	80%	81%	68%	51%
In a bar or pub	17%	12%	18%	16%	19%	17%	14%	21%	39%
In a restaurant	31%	27%	24%	29%	26%	30%	21%	33%	46%

* Please note the small sample size (n<50)

Green / turquoise: Statistically significantly higher than 3 or more / 2 sparkling wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Buying channels

Drinkers aged 19–34 shop for sparkling wine in a broader range of channels, notably online, including direct from a winery website

Sparkling wine-buying channels: by age and gender

% who have purchased sparkling wine from the following channels in the past six months
Base = All drinkers of sparkling wine (n=1,209)

	All drinkers of sparkling wine in Canada	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=1,209)	(n=173)	(n=182)	(n=168)	(n=236)	(n=254)	(n=191)
In a government-controlled liquor store	52%	36%	48%	68%	46%	54%	63%
In a privatized liquor store	21%	22%	26%	16%	23%	21%	16%
In a private wine store	17%	21%	19%	10%	20%	18%	13%
In a wine store attached to a grocery	16%	21%	18%	8%	21%	16%	10%
In a beer and wine (convenience) store	13%	24%	13%	5%	17%	15%	4%
In a grocery store	13%	16%	15%	9%	18%	12%	7%
In a super store	12%	20%	16%	4%	15%	11%	4%
From a supermarket / liquor store	12%	17%	14%	6%	15%	10%	5%
In a club store	10%	15%	12%	5%	9%	9%	7%
From a winery during a visit	9%	12%	10%	6%	14%	9%	4%
From Duty Free	8%	13%	8%	4%	13%	6%	3%
From a winery's website	6%	12%	5%	2%	11%	5%	1%
From a make your own wine store	6%	15%	6%	1%	9%	4%	1%
From an online retailer	5%	11%	7%	1%	8%	4%	1%
From a wine club or membership	5%	10%	8%	1%	7%	3%	2%
From a delivery app	5%	10%	8%	1%	6%	3%	1%

37% of drinkers aged 19–34 are **online users** (vs 23% of all sparkling wine drinkers)

% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Choice cues

Familiarity with brands is one of the most important choice cues, especially for Prosecco; recommendations by friends and family rank second and are equally important for all types

Sparkling wine choice cues in the off-trade

Sparkling wine types sorted by sample size
% who find the following factors to be the most important factor when buying sparkling wine in the off-trade
Base = Those who have drunk the following sparkling wine types

	Pink or Rosé sparkling wine or Champagne	Prosecco	Sparkling wine from Canada	Champagne	Sparkling wine from the USA	Sparkling wine from Australia / New Zealand	Sparkling wine from other countries	Cava	Sekt*
A brand I am aware of	23%	33%	24%	28%	22%	24%	24%	21%	26%
Recommendation by friends or family	19%	17%	17%	12%	19%	21%	15%	19%	14%
Promotional offer	9%	10%	11%	9%	11%	9%	8%	11%	13%
Recommendation by shop staff or shop leaflets	11%	7%	11%	11%	10%	10%	12%	8%	5%
Appeal of the bottle and / or label design	11%	9%	9%	10%	7%	5%	8%	8%	11%
Recommendation by wine critic or writer	8%	6%	7%	9%	8%	6%	9%	13%	8%
Whether the sparkling wine has won a medal or award	5%	4%	4%	6%	9%	6%	5%	4%	11%
Whether it's suitable for gifting	5%	5%	6%	8%	6%	7%	8%	6%	3%
Alcohol content	6%	5%	8%	4%	6%	9%	6%	4%	5%

* Please note the small sample size (n<50)

Top 3 choice cues for the sparkling wine type

Green / turquoise: Statistically significantly higher than 3 or more / 2 sparkling wine types at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Formats

Men under 35 are most inclined to buy sparkling wine in a different format than the standard glass bottle, both for home drinking and when going out

Sparkling wine format purchase

% who purchase the following sparkling wine formats in the off-premise/on-premise
Base = Those who purchase in the off-premise/on-premise

	Those who purchase in the off-premise	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=1,017)	(n=144)	(n=151)	(n=141)	(n=198)	(n=218)	(n=162)
Bottle (750ml)	83%	74%	83%	88%	82%	85%	87%
Magnum (1.5L)	16%	25%	20%	11%	20%	14%	7%
Half bottle (375ml)	12%	23%	13%	6%	18%	9%	6%
Single serve bottle (200ml)	12%	19%	10%	5%	17%	10%	8%
Single serve can	7%	15%	4%	4%	10%	8%	4%

	Those who purchase in the on-premise	Male			Female		
		LDA-34	35-54	55+*	LDA-34	35-54	55+*
	(n=500)	(n=108)	(n=80)	(n=37)	(n=124)	(n=102)	(n=44)
By the glass	70%	56%	62%	67%	74%	77%	91%
By the bottle (750ml)	38%	49%	54%	43%	38%	25%	13%
By the half bottle (375ml)	18%	27%	19%	9%	19%	11%	13%
By the small bottle (200ml)	11%	23%	9%	3%	10%	7%	2%

Smaller formats are attracting more consumers: half-bottle (+3ppt ⬆), and single-serve can (+2ppt ⬆) in off-premise; half-bottle (+6ppt ⬆) in on-premise

* Please note the small sample size (n<50)

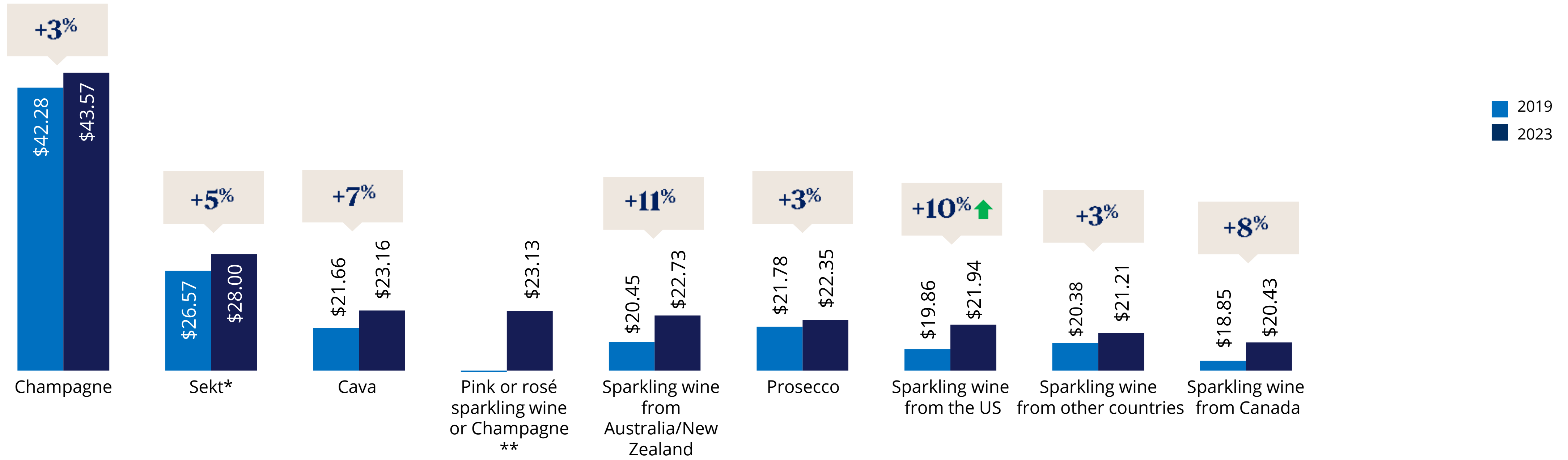
% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Typical spend in the off-premise

Recalled spend has gone up slightly for all sub-categories, but only significantly for US sparkling wine

Typical spend in the off-premise by the bottle

Mean typical spend, expressed in CAD
Base = Those who have purchased the following sparkling wine types in the off-premise



* Please note the small sample size (n<50)
** No tracking available

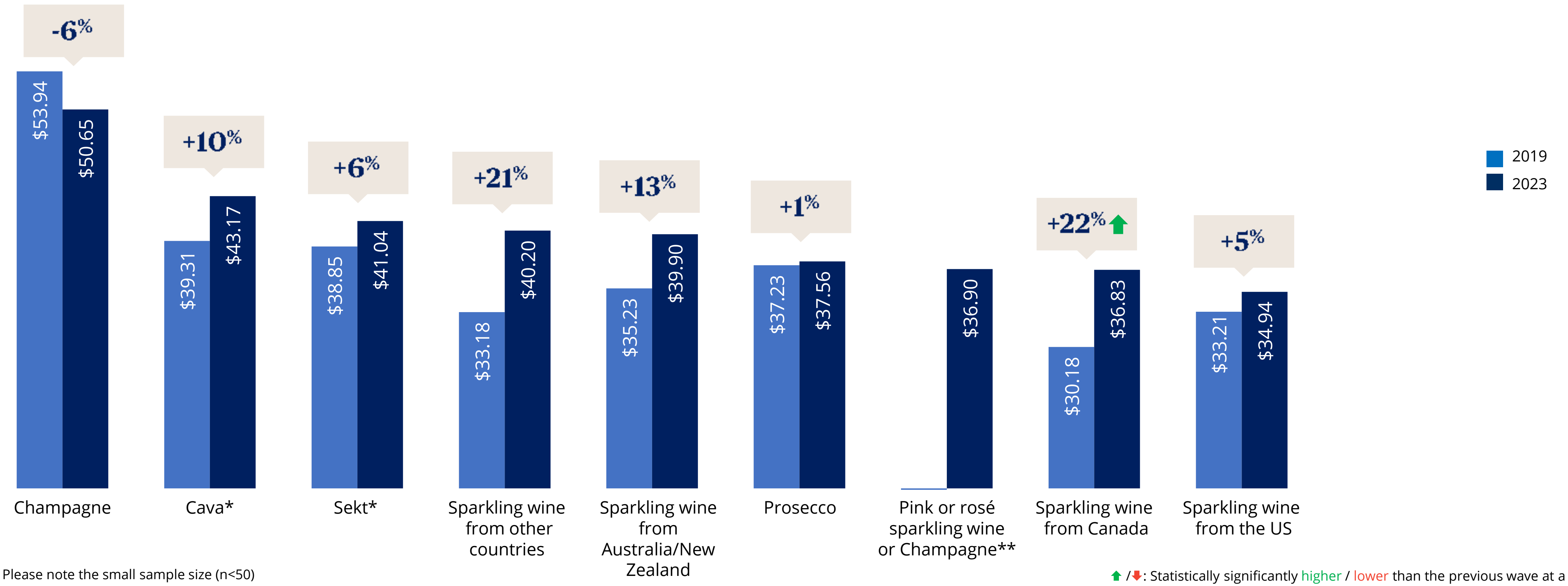
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Typical spend in the on-premise

There have been increases in spend in the on-premise for all sub-categories except Champagne, and to a significant degree for sparkling wine from Canada

Typical spend in the on-premise by the bottle

Mean typical spend, expressed in CAD
Base = Those who have purchased the following sparkling wine types in the on-premise



* Please note the small sample size (n<50)
** No tracking available

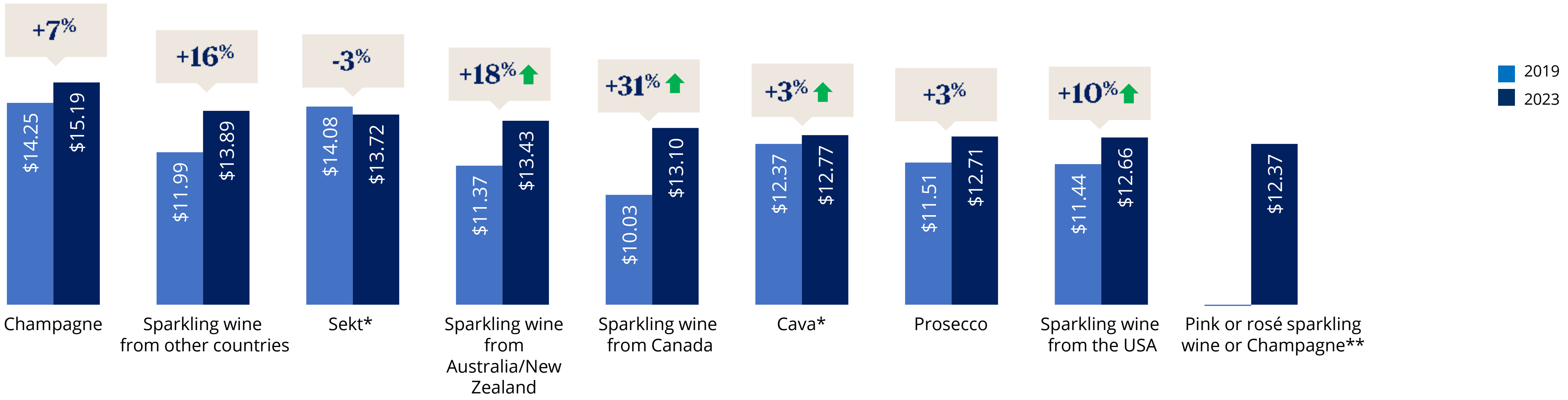
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Typical spend in the on-premise

Consumers recall spending significantly more for Canadian sparkling wine sold by the glass in the on-premise than four years ago, and more, but to a lesser extent, for Australia, New Zealand and the US

Typical spend in the on-premise by the glass

Mean typical spend, expressed in CAD
Base = Those who have purchased the following sparkling wine types in the on-premise



* Please note the small sample size (n<50)
** No tracking available

/ : Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Attitudes and Involvement

Sparkling wine in the Canadian market

2023

Attitudes towards sparkling wine

Most Canadian sparkling wine drinkers enjoy trying new and different styles of sparkling wine on a regular basis, similar to 2019 levels; over 54s prefer to stick to the sparkling wines they know and like

Attitudes towards sparkling wine: Tracking

% who have selected the following statements to be applicable to them
Base = All drinkers of sparkling wine (n≥1,000)

	2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of sparkling wine on a regular basis	**40%**	**36%**	**41%**	→	↑
I don't mind what sparkling wine I buy so long as the price is right	**25%**	**28%**	**24%**	→	↓
I know what sparkling wine I like and I tend to stick to what I know	**35%**	**35%**	**35%**	→	→

51% of drinkers aged 35–44 are **explorers**: they enjoy trying new and different styles of sparkling wine on a regular basis

Attitudes towards sparkling wine, by age and gender

% who have selected the following statements to be applicable to them
Base = All drinkers of sparkling wine (n=1,209)

	All drinkers of sparkling wine in Canada	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=1,209)	(n=173)	(n=182)	(n=168)	(n=236)	(n=254)	(n=191)
I enjoy trying new and different styles of sparkling wine on a regular basis	**41%**	**43%**	**44%**	**27%**	**43%**	**49%**	**33%**
I don't mind what sparkling wine I buy so long as the price is right	**24%**	**28%**	**26%**	**21%**	**26%**	**23%**	**19%**
I know what sparkling wine I like and I tend to stick to what I know	**35%**	**29%**	**30%**	**52%**	**31%**	**28%**	**49%**

↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Involvement, value and expertise

There is a slightly higher level of involvement among men under 55, while women aged 55 or older are the least confident or involved in the category

Sparkling wine involvement, value and expertise, by age and gender

% who 'agree' or 'strongly agree' with the following statements
Base = All drinkers of sparkling wine (n=1,209)

	All drinkers of sparkling wine in Canada (n=1,209)	Male LDA-34 (n=173)	Male 35-54 (n=182)	Male 55+ (n=168)	Female LDA-34 (n=236)	Female 35-54 (n=254)	Female 55+ (n=191)
Drinking sparkling wine gives me pleasure	77%	73%	79%	75%	73%	81%	80%
I always look for the best quality sparkling wines I can get for my budget	72%	71%	71%	73%	73%	73%	72%
I like to take my time when I purchase a bottle of sparkling wine	64%	67%	65%	56%	66%	65%	65%
Deciding which sparkling wine to buy is an important decision	60%	63%	57%	60%	59%	60%	59%
Generally speaking, sparkling wine is an expensive drink	48%	56%	53%	48%	52%	44%	36%
I have a strong interest in sparkling wine	47%	58%	55%	32%	49%	51%	36%
I feel competent about my knowledge of sparkling wine	41%	58%	48%	31%	42%	41%	25%
Sparkling wine is important to me in my lifestyle	40%	52%	46%	31%	44%	36%	30%

46% of men are confident in their knowledge of sparkling wine (vs 37% of women)

% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Brand Health

Sparkling wine in the Canadian market

2023

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**
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	

Wine Brand Power Index

Sparkling wine Brand Power Index Canada 2023

[yellow tail] 1st

JACOB'S CREEK 2nd

MARTINI 3rd

Sparkling wine Brand Power Index 2023

The top four brands in the market are unchanged, with New World sparkling wines Yellow Tail and Jacob's Creek leading the way

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Yellow Tail	93.3	=	3.2
2	Jacob's Creek	92.0	=	-0.7
3	Martini	82.5	=	5.0
4	Moët & Chandon	82.3	=	-2.8
5	Henkell	81.3	↑+2	-8.1
6	Dom Pérignon	78.9	↓-1	-4.4
7	Barefoot Bubbly	74.4	↓-1	0.0
8	Veuve Clicquot	71.5	=	-3.5
9	Freixenet	68.0	↑+2	-8.2
10	Baby Duck	66.7	=	-1.3
11	Ruffino	59.4	↓-2	6.5
12=	Bottega	56.8	↑+4	-5.5
12=	La Marca	56.8	↑+6	-7.2
14	GH Mumm	54.7	=	-0.5
15	Chandon	52.7	↓-3	2.3

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16	Cupcake	52.5	↓-3	2.0
17	JP Chenet	51.6	↑+1	-2.0
18	Spumante Bambino	51.0	↓-1	-0.2
19	President	50.3	↓-4	2.4
20	Mumm Napa	48.2	↑+5	-3.9
21	Le Foret Noire	46.4	↑+6	-2.5
22	La Scala	46.3	=	0.3
23	Segura Viudas	45.8	↑+8	-3.9
24	Zonin	45.4	↓-1	1.1
25=	Mionetto	45.2	↑+1	-0.9
25=	Blu Giovello	45.2	↓-1	0.0
27	Trius Winery	45.0	↓-7	4.3
28	Nicolas Feuillatte	45.0	↑+20	-7.9
29	Santa Margherita	43.9	↑+11	-3.9
30	Andrés	43.7	↑+15	-5.6

= Represents equal rankings
↑/↓: Ranking higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

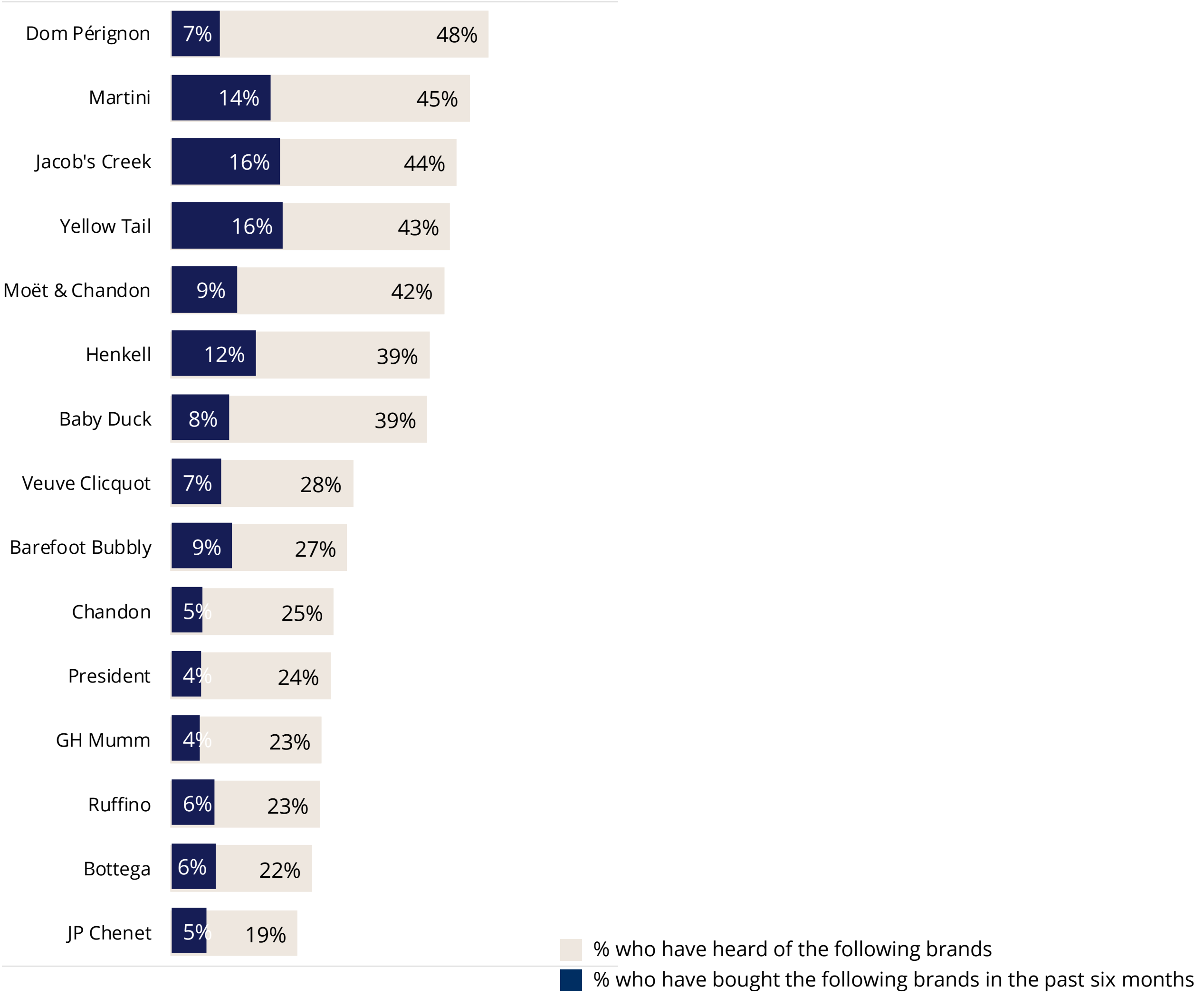
Sparkling wine brands consumption and awareness

The highest awareness levels are for the luxury Champagne house Dom Pérignon, with nearly half recognising it as a brand, though fewer than 10% bought it in the past 12 months.

Mainstream brands Martini, Jacob's Creek and Yellow Tail have the highest conversion ratios.

Top 15 sparkling wine brands

% who have heard of the following brands and % who have bought the them in past six months
Base = All drinkers of sparkling wine (n=1,209)



Source: Wine Intelligence, Vinitrac® Canada, May 2023 (n=1,209) drinkers of sparkling wine in Canada

Sparkling wine brand awareness

There has been a decline in long-term awareness of the top brands since the pandemic, but most rebounded in 2022, although not to 2019 levels

Brand awareness: Top 30

% who have heard of the following brands
Base = All drinkers of sparkling wine (n≥1,008)

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
1	Dom Pérignon	56%	41%	48%	↓	↑
2	Martini	48%	43%	45%	→	→
3	Jacob's Creek	42%	37%	44%	→	↑
4	Yellow Tail	48%	39%	43%	↓	→
5	Moët & Chandon	47%	37%	42%	↓	↑
6=	Henkell	44%	34%	39%	↓	↑
6=	Baby Duck	47%	36%	39%	↓	→
8	Veuve Clicquot	29%	25%	28%	→	→
9	Barefoot Bubbly	32%	25%	27%	↓	→
10	Chandon	25%	23%	25%	→	→
11	President	32%	22%	24%	↓	→
12=	GH Mumm	22%	18%	23%	→	↑
12=	Ruffino	27%	26%	23%	↓	→
14	Bottega	19%	18%	22%	→	↑
15=	JP Chenet	20%	19%	19%	→	→

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
15=	Freixenet	21%	18%	19%	→	→
15=	Prosecco Valdobbiadene Casabianca	25%	16%	19%	↓	→
18	Spumante Bambino	24%	16%	18%	↓	→
19=	Cupcake	18%	17%	17%	→	→
19=	Mumm Napa	20%	15%	17%	→	→
19=	La Scala	18%	16%	17%	→	→
19=	Andrés	23%	14%	17%	↓	→
23	Mionetto	n/a	13%	16%	n/a	→
24	Krug	19%	12%	15%	↓	↑
25=	Le Foret Noire	17%	11%	14%	→	↑
25=	Perrier Jouet	17%	14%	14%	→	→
25=	Bollinger	22%	15%	14%	↓	→
25=	Laurent Perrier	19%	13%	14%	↓	→
29=	Blue Mountain	16%	13%	13%	→	→
29=	La Marca	9%	11%	13%	↑	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Sparkling wine brand purchase

Purchase incidence is mostly stable, though Yellow Tail has suffered a significant decrease since 2019, allowing Jacob's Creek to take joint first place with it for this metric

Brand purchase: Top 30

% who have bought the following brands in the past six months
Base = All drinkers of sparkling wine (n≥1,008)

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
1=	Yellow Tail	23%	16%	16%	↓	→
1=	Jacob's Creek	15%	14%	16%	→	→
3	Martini	16%	14%	14%	→	→
4	Henkell	12%	10%	12%	→	↑
5=	Moët & Chandon	13%	8%	9%	↓	→
5=	Barefoot Bubbly	11%	9%	9%	→	→
7	Baby Duck	10%	8%	8%	→	→
8=	Veuve Clicquot	8%	6%	7%	→	→
8=	Dom Pérignon	7%	6%	7%	→	→
8=	Freixenet	6%	5%	7%	→	→
11=	Bottega	5%	5%	6%	→	→
11=	Ruffino	6%	8%	6%	→	→
13=	JP Chenet	5%	5%	5%	→	→
13=	La Marca	3%	4%	5%	↑	→
13=	Chandon	3%	5%	5%	→	→

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
16=	President	7%	4%	4%	↓	→
16=	Spumante Bambino	7%	4%	4%	↓	→
16=	GH Mumm	3%	3%	4%	→	→
16=	Cupcake	5%	5%	4%	→	→
16=	Le Foret Noire	4%	3%	4%	→	→
21=	Mionetto	n/a	3%	3%	n/a	→
21=	Zonin	2%	3%	3%	↑	→
21=	Prosecco Valdobbiadene Casabianca	4%	3%	3%	→	→
21=	Mumm Napa	5%	3%	3%	↓	→
21=	La Scala	4%	3%	3%	→	→
21=	Trius Winery	3%	3%	3%	→	→
21=	Santa Margherita	n/a	2%	3%	n/a	→
21=	Blue Mountain	3%	2%	3%	→	→
21=	Andrés	4%	2%	3%	→	→
30	Verdi	2%	2%	2%	→	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Sparkling wine brand conversion

In line with purchase measures, sparkling wine brands are mostly stable on conversion rates, though Yellow Tail has seen a significant decline since 2019

Brand conversion: Top 30

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

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	48%	42%	38%	↓	→
2=	La Marca	32%	36%	37%	→	→
2=	Jacob's Creek	36%	38%	37%	→	→
4	Freixenet	29%	28%	36%	→	→
5	Barefoot Bubbly	35%	37%	33%	→	→
6	Martini	33%	32%	32%	→	→
7	Henkell	26%	29%	31%	→	→
8=	Zonin	27%	33%	30%	→	→
8=	Pares Balta	n/a	27%	30%	n/a	→
10=	Bottega	26%	28%	29%	→	→
10=	Hungaria	29%	26%	29%	→	→
12	Segura Viudas	32%	32%	28%	→	→
13=	Ruffino	21%	30%	27%	→	→
13=	Le Foret Noire	25%	27%	27%	→	→
13=	Santa Margherita	n/a	22%	27%	n/a	→

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
16=	Veuve Clicquot	26%	26%	26%	→	→
16=	JP Chenet	23%	26%	26%	→	→
18	Trius Winery	35%	31%	25%	→	→
19=	Michelle	12%	16%	24%	→	→
19=	Nicolas Feuillatte	25%	21%	24%	→	→
21=	Cupcake	26%	27%	23%	→	→
21=	Blu Giovello	40%	25%	23%	↓	→
21=	Spumante Bambino	27%	27%	23%	→	→
21=	Moët & Chandon	26%	22%	23%	→	→
25	Villa Teresa	20%	22%	22%	→	→
26=	Baby Duck	21%	23%	21%	→	→
26=	Mionetto	n/a	24%	21%	n/a	→
26=	Korbel	19%	23%	21%	→	→
26=	Blue Mountain	18%	17%	21%	→	→
30	Riunite	n/a	21%	20%	n/a	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Sparkling wine brand consideration

There has been an increase in short-term brand consideration for Champagne houses Veuve Clicquot and Pommery; the rest of the category is stable

Brand consideration: Top 30

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

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
1	Veuve Clicquot	65%	53%	64%	→	↑
2=	Yellow Tail	65%	64%	61%	→	→
2=	Freixenet	60%	56%	61%	→	→
4	Barefoot Bubbly	60%	58%	60%	→	→
5=	Jacob's Creek	60%	62%	59%	→	→
5=	Moët & Chandon	61%	60%	59%	→	→
7	Henkell	53%	52%	56%	→	→
8	Dom Pérignon	51%	50%	53%	→	→
9	La Marca	46%	48%	52%	→	→
10=	Bottega	42%	45%	50%	→	→
10=	Ruffino	49%	52%	50%	→	→
12=	Nicolas Feuillatte	50%	43%	49%	→	→
12=	Segura Viudas	53%	45%	49%	→	→
14=	Cristal	45%	46%	48%	→	→
14=	Martini	53%	53%	48%	→	→
14=	Cupcake	55%	52%	48%	→	→
14=	Zonin	56%	48%	48%	→	→
18=	Piper Heidsieck	49%	46%	47%	→	→
18=	Spumante Bambino	50%	47%	47%	→	→
18=	Mumm Napa	54%	45%	47%	→	→
21=	JP Chenet	44%	44%	46%	→	→
21=	Blu Giovello	57%	46%	46%	→	→
23=	GH Mumm	47%	51%	45%	→	→
23=	Pommery	35%	31%	45%	→	↑
23=	Taittinger	43%	41%	45%	→	→
23=	Trius Winery	56%	57%	45%	→	→
27=	Laurent Perrier	45%	41%	44%	→	→
27=	Codorníu	45%	52%	44%	→	→
27=	Henry of Pelham Cuvee Catharine	42%	43%	44%	→	→
27=	Perrier Jouet	47%	37%	44%	→	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Sparkling wine brand affinity

In line with other measures, brand affinity is stable, with the exception of a decline for Yellow Tail, which could help to explain its negatively impacted purchase and conversion rates

Brand affinity: Top 30

% 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=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	58%	55%	51%	↓	→
2=	Barefoot Bubbly	49%	52%	50%	→	→
2=	Freixenet	50%	44%	50%	→	→
4	Jacob's Creek	50%	55%	49%	→	↓
5	Segura Viudas	40%	33%	47%	→	→
6	Riunite	n/a	31%	46%	n/a	→
7	Moët & Chandon	43%	43%	44%	→	→
8	Cupcake	43%	39%	43%	→	→
9=	Henkell	40%	37%	42%	→	→
9=	La Marca	40%	40%	42%	→	→
11=	Veuve Clicquot	49%	44%	41%	→	→
11=	Henry of Pelham Cuvee Catharine	39%	32%	41%	→	→
13	Blu Giovello	49%	42%	39%	→	→
14=	Ruffino	33%	42%	38%	→	→
14=	Michelle	26%	25%	38%	→	→

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
16=	Martini	41%	42%	37%	→	→
16=	Trius Winery	45%	37%	37%	→	→
18	La Scala	36%	38%	36%	→	→
19=	Dom Pérignon	30%	37%	35%	→	→
19=	GH Mumm	34%	39%	35%	→	→
19=	Santa Margherita	n/a	34%	35%	n/a	→
19=	Zonin	29%	39%	35%	→	→
23=	Spumante Bambino	42%	35%	34%	→	→
23=	Mumm Napa	42%	28%	34%	→	→
23=	Baby Duck	30%	32%	34%	→	→
23=	Nicolas Feuillatte	31%	26%	34%	→	→
23=	Louis Roederer	28%	30%	34%	→	→
23=	Pares Balta	n/a	26%	34%	n/a	→
29=	Perrier Jouet	28%	32%	33%	→	→
29=	Hungaria	29%	34%	33%	→	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ /↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Sparkling wine brand recommendation

In line with affinity scores, fewer of those who are aware of Yellow Tail would recommend the brand to a friend compared than in previous waves; Korbel has significantly improved in this metric

Brand recommendation: Top 30

% 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=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
1	Veuve Clicquot	53%	52%	52%	→	→
2	Freixenet	44%	42%	49%	→	→
3	Moët & Chandon	48%	49%	48%	→	→
4	La Marca	42%	35%	47%	→	↑
5=	Barefoot Bubbly	42%	45%	46%	→	→
5=	Dom Pérignon	41%	43%	46%	→	→
7=	Jacob's Creek	46%	48%	44%	→	→
7=	Yellow Tail	56%	51%	44%	↓	↓
9	Henkell	39%	41%	41%	→	→
10=	Nicolas Feuillatte	29%	29%	39%	→	→
10=	Korbel	22%	28%	39%	↑	→
10=	GH Mumm	38%	43%	39%	→	→
10=	Segura Viudas	44%	39%	39%	→	→
14	Riunite	n/a	34%	38%	n/a	→
15=	Ruffino	30%	36%	37%	→	→

Ranking '23		2019 (n=1,000)	2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '19	Tracking vs. '22
15=	Bottega	29%	33%	37%	→	→
17=	Blu Giovello	49%	38%	36%	→	→
17=	Codorníu	36%	35%	36%	→	→
17=	Schramsberg	38%	33%	36%	→	→
20	Mumm Napa	37%	35%	35%	→	→
21=	Martini	37%	42%	34%	→	↓
21=	Spumante Bambino	34%	35%	34%	→	→
21=	Zonin	25%	31%	34%	→	→
21=	Santa Margherita	n/a	30%	34%	n/a	→
25=	La Gioiosa	n/a	36%	33%	n/a	→
25=	Le Foret Noire	33%	34%	33%	→	→
27=	Trius Winery	43%	43%	32%	→	→
27=	Michelle	24%	27%	32%	→	→
27=	JP Chenet	27%	30%	32%	→	→
30=	Pares Balta	n/a	33%	31%	n/a	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

Sparkling wine brand most often bought

Most brands have similar incidence to 2022; Segura Viudas, La Marca, Martini and Korbel all achieved an incidence of 50% or higher although from a smaller base

Brand most-often bought: Top 30

% who buy the following brand most often
Base = Those who have purchased the following brands in the past six months

Ranking '23		2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '22
1	Segura Viudas	53%	54%	➡
2	La Marca	45%	52%	➡
3	Martini	48%	51%	➡
4	Korbel	24%	50%	➡
5=	Riunite	41%	49%	➡
5=	Henkell	47%	49%	➡
7=	Baby Duck	38%	48%	➡
7=	Yellow Tail	48%	48%	➡
9	Jacob's Creek	53%	47%	➡
10	Andrés	19%	45%	➡
11=	Barefoot Bubbly	38%	44%	➡
11=	Zonin	45%	44%	➡
13	Freixenet	31%	43%	➡
14	Yellowglen	23%	42%	➡
15=	Le Foret Noire	39%	41%	➡

Ranking '23		2022 (n=1,213)	2023 (n=1,209)	Tracking vs. '22
15=	Dom Pérignon	34%	41%	➡
17	Schramsberg	24%	40%	➡
18	Gloria Ferrer	23%	39%	➡
19	Blue Mountain	24%	37%	➡
20=	Moët & Chandon	36%	35%	➡
20=	Blu Giovello	42%	35%	➡
22	Mionetto	31%	34%	➡
23=	Sumac Ridge Stellers Jay Brut	28%	33%	➡
23=	Chandon	33%	33%	➡
25=	Hungaria	33%	32%	➡
25=	Veuve Clicquot	42%	32%	➡
27	La Gioiosa	25%	31%	➡
28=	President	33%	30%	➡
28=	JP Chenet	31%	30%	➡
28=	La Scala	45%	30%	➡

Results for all brands tested available in the data table

2019 tracking not available due to methodology change
= Represents equal rankings; n/a: brand not tested during this wave; grey shading: low sample size (n<50)
⬆/⬇: Statistically significantly higher / lower than the May 2022 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, May 2022 - May 2023 (n≥1,209) drinkers of sparkling wine in Canada

Research Methodology

Sparkling wine in the Canadian market

2023

Research methodology

QUANTITATIVE

The data was collected in Canada since March 2017

The following waves May 2019, May 2021 and May 2022 were tracked against May 2023

Respondents were screened to ensure they were:

- Aware of at least one sparkling wine type
- Drink at least one type of sparkling wine at least once a year

For the purpose of tracking, a subset of sparkling wine drinkers who have drunk sparkling at least once a year (n = 912) in 2017 data have been used

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of Canadian sparkling wine drinkers in terms of age, gender* and province

Champagne from Canada was surveyed and then removed during analysis

The distribution of the sample is shown in the table:

		May-19	May-22	May-23
	n=	1,000	1,213	1,209
Gender*	Male	46%	46%	43%
	Female	54%	53%	56%
	Total	***100%***	***99%***	***100%***
Age	19-24	11%	8%	10%
	25-34	23%	30%	24%
	35-44	23%	21%	20%
	45-54	15%	16%	17%
	55-64	13%	11%	15%
	65 and over	15%	14%	15%
	Total	***100%***	***100%***	***100%***
Province	Quebec	24%	30%	27%
	Ontario	40%	37%	38%
	West	30%	30%	30%
	Other Provinces	5%	3%	6%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac® Canada, May 2019 - May 2023 (n≥1,000) drinkers of sparkling wine in Canada

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

Research methodology

BRAND POWER INDEX

The **Brand Power Index** is calculated by comparing the tested origins' incidence rates against each others for each health measure. We do this by comparing the individual incidence of each origin against the highest incidence of all origins to gauge how far / close each individual origin is to the top origin in each measure.

In this process, the incidence (%) is converted to an indexed value (#) per origin, for each measure, because we are dividing percentages to reach an integer. Once we have indexed each origin for each measure, we then again index these indexes to create one final indexed score which we use to rank the origin in the market. Each health measure is given a different weighting.

The index does not take account of sales volumes or value, sales trends over time or opinions.

Awareness	% who have heard of each brand (when prompted with a list of brand names and logos) Base = All wine drinkers	Brand awareness 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	

Brand Power Index

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Wine Intelligence Ltd: Nutmeg House, 60 Gainsford Street, London SE1 2NY
Tel: 020 8194 0090. E-mail: info@wineintelligence.com
Registered in England as a limited company number: 4375306

A division of the IWSR Group

Wine Intelligence London (Head Office)

Nutmeg House
60 Gainsford Street
London
SE1 2NY

Telephone: +44 (0)20 8194 0090
E-mail: info@wineintelligence.com
Website: www.wineintelligence.com

Follow us: