



the gandalf group

Canadian Vintners Association

Direct-to-Consumer Retailing Survey
December 5 2017



Sample

n=1008 Canadians, weighted to reflect the country's gender, age, and regional distribution



Margin of Error

For a random sample would be +/- 3.1%, 19 times out of 20



Online study

Completed Online
November 22-28, 2017

	Male	Female	BC	AB	SK/MB	ON	QC	Atlantic
n=	478	530	144	113	57	389	234	70
MOE	±4.5%	±4.3%	±8.2%	±9.2%	±13%	±4.5%	±6.4%	±11.7%

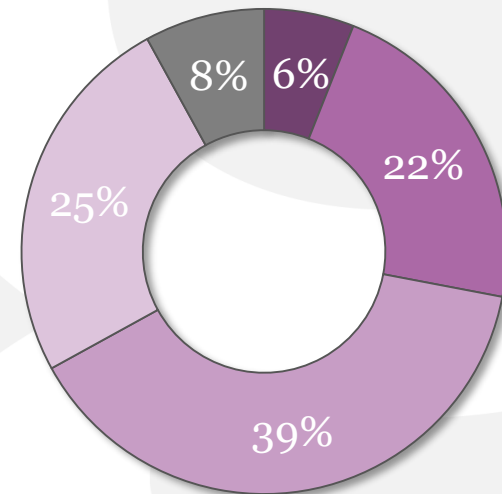


Canadian Wine Consumers

- Three quarters of Canadians are wine drinkers, and most purchase Canadian wine at least some of the time.

76%
of Canadians
drink wine at least
occasionally

“How much of the wine that you purchase is made in Canada?”



■ All of it ■ Most of it ■ Some of it
■ Very little of it ■ None of it

“How frequently do you drink wine?” / “How much of the wine that you purchase is made in Canada?”



Valuation of the Canadian Wine Industry

- The Canadian wine industry is believed to produce high quality products, and provide benefits to Canada's economy and cultural life.

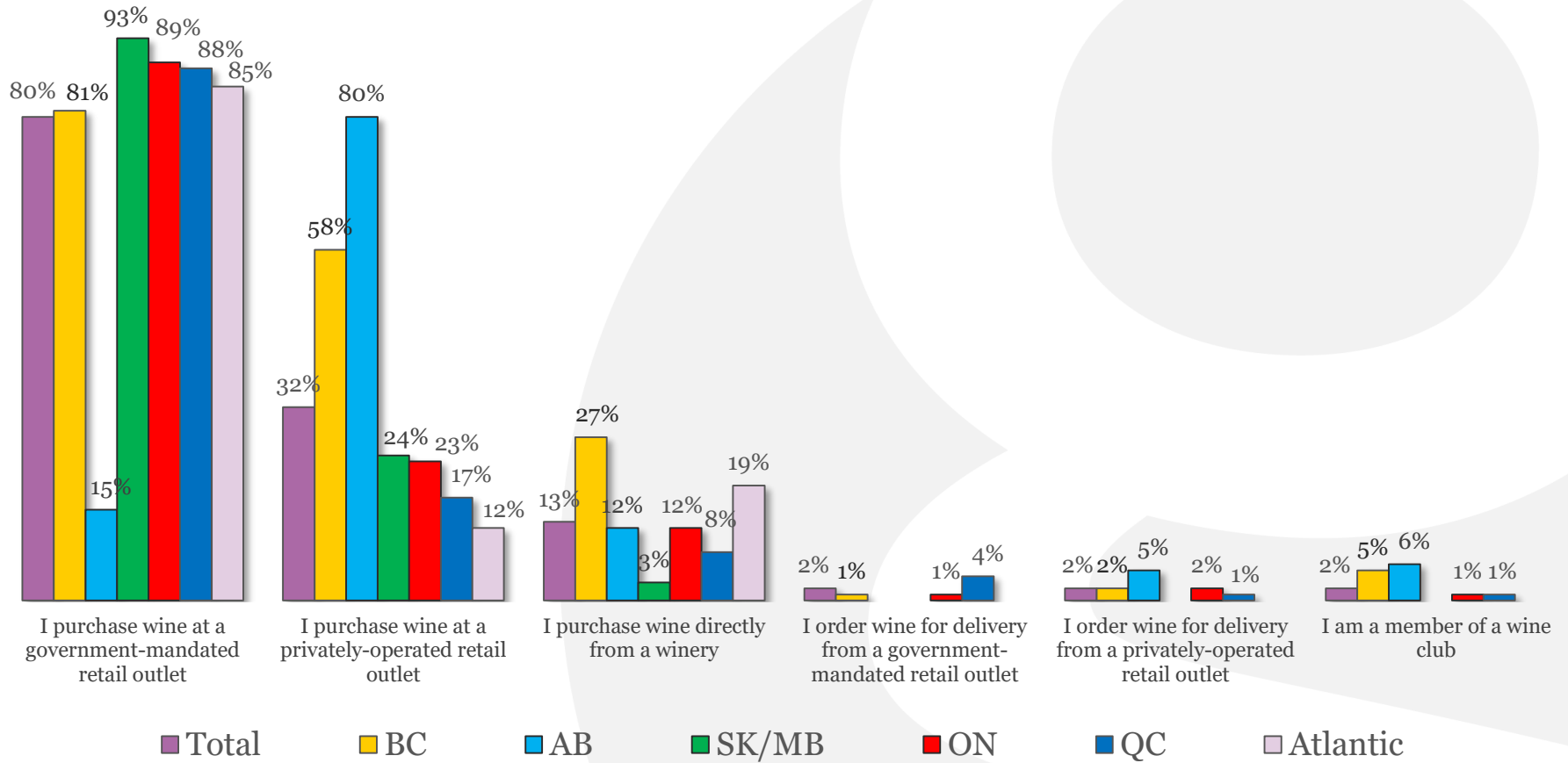


"The following are some reasons people give for why consumers should be allowed to order wine for delivery directly from Canadian wineries. Please tell us whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each."



Method of Purchasing Wine

- Wine drinkers across the country (with the exception of Alberta), most frequently purchase their wine at a government-mandated retail outlet.
- Very few Canadians currently have their wine delivered directly from a winery.



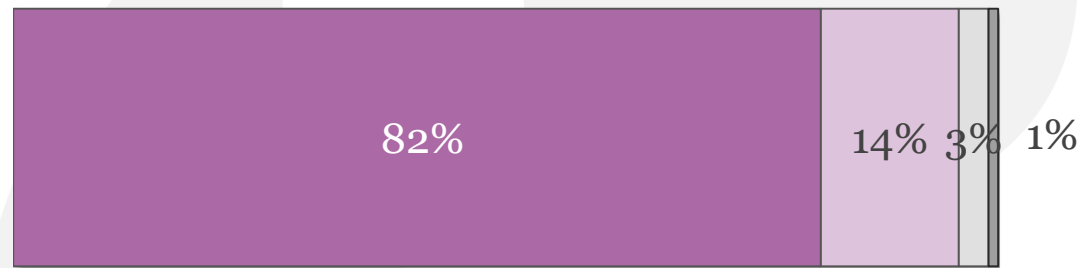
“How do you typically purchase wine?”



Satisfaction with Wine Purchasing Experience

- The in-store retail experience is reportedly good for most wine drinkers. 8 in 10 say they are *'very satisfied'* with the experience at the outlet they typically use.

"How satisfied are you with the experience of purchasing wine from the outlet(s) you typically use?"



■ Very satisfied (7-9)

■ Somewhat satisfied (4-6)

■ Not satisfied (1-3)

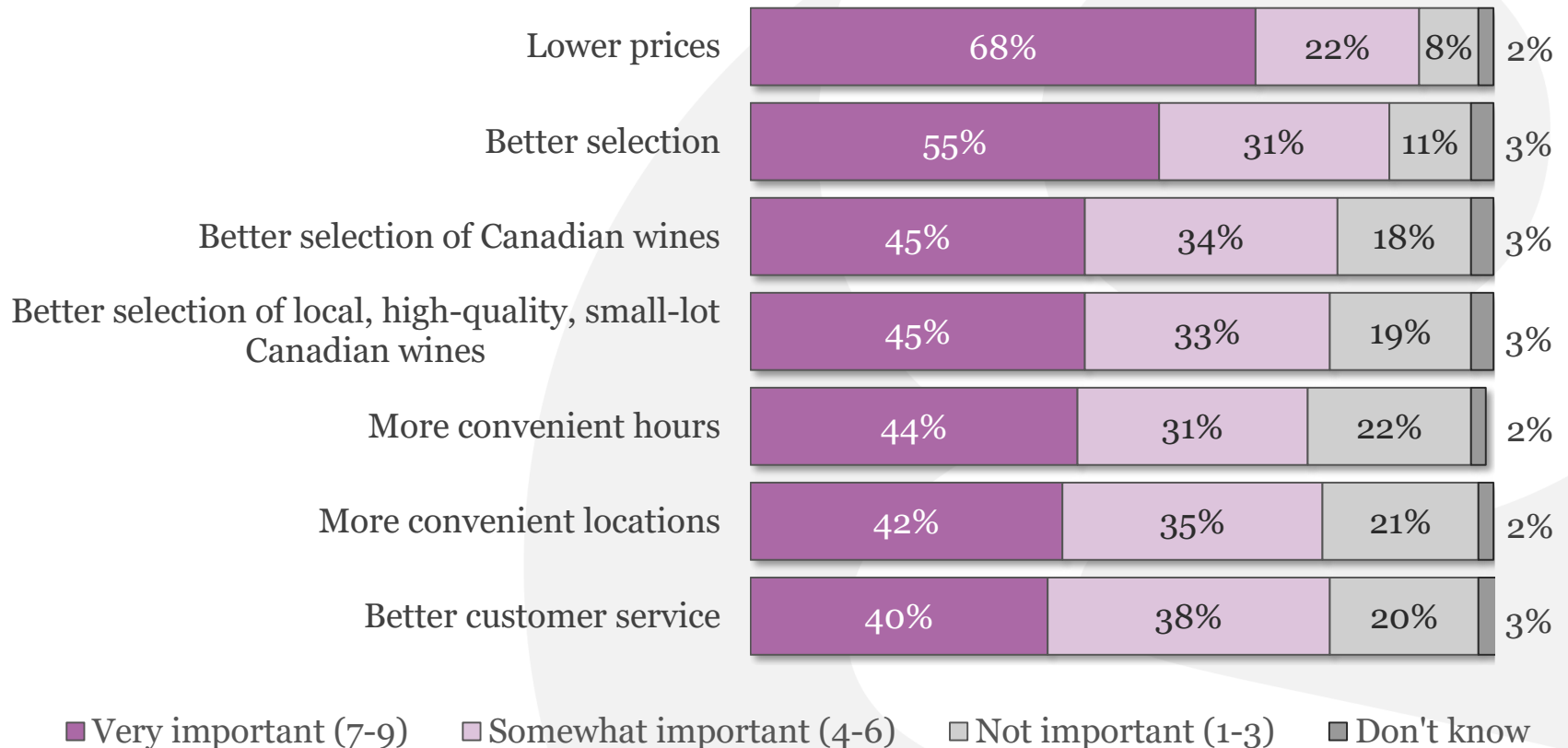
■ Don't know

"Overall, how satisfied are you with the experience of purchasing wine from the outlet(s) that you typically use? Please tell us using a scale of one to nine where one is not satisfied at all and nine is very satisfied."



Prioritizing Changes to Wine Retailing

- While customers are mostly satisfied currently, it is important that any changes to wine retailing prioritizes lower prices, and better selection – including of Canadian wines.

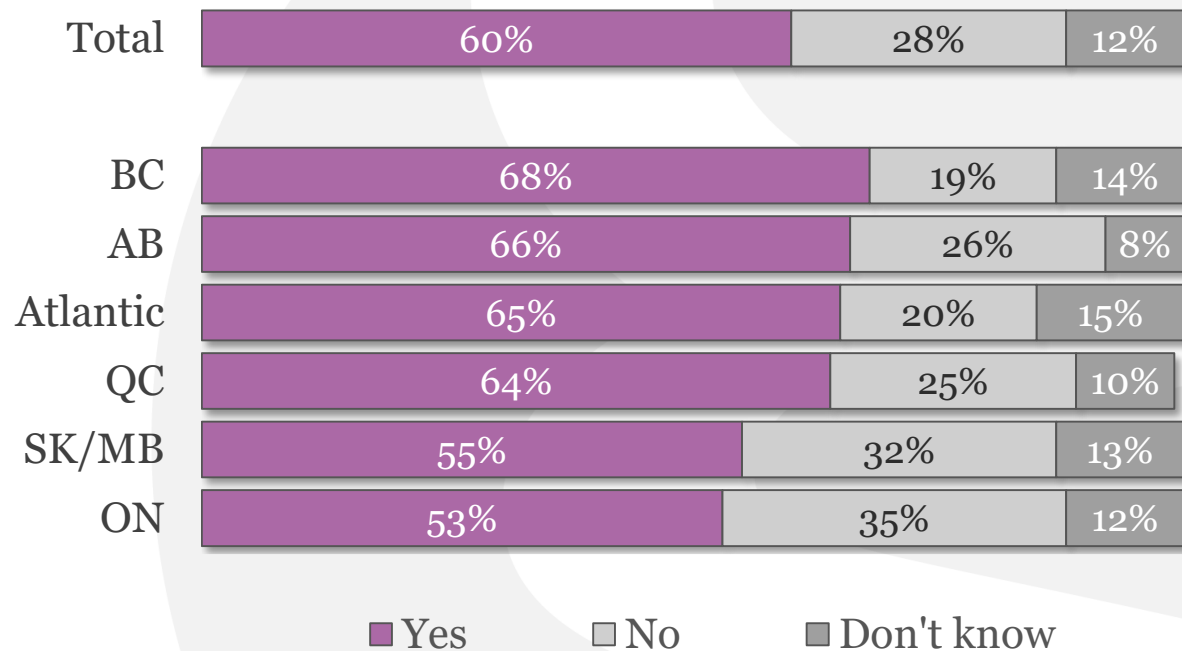


“How important would each of the following be to you, if they were proposed as changes to wine retailing? Please tell us using a scale of one to nine where one means “completely unimportant” and nine means “very important.”



Awareness of Alcohol Transportation Restrictions

- 6 in 10 Canadians are aware that there are laws that restrict consumers from freely transporting alcoholic beverages across provincial or territorial borders within Canada.
- Those from Ontario, Saskatchewan and Manitoba are least likely to be aware of such restrictions, but majorities are aware across the country.



“Are you aware of laws that restrict consumers from freely transporting alcoholic beverages across provincial or territorial borders within Canada?”



Availability of Direct Purchase From Canadian Wineries

- Just 9% of Canadians believe that it is currently permissible for consumers to order wine for delivery directly from Canadian wineries in any province.
- Belief that this type of retailing is allowed is low in every province, regardless of if it is currently permissible.



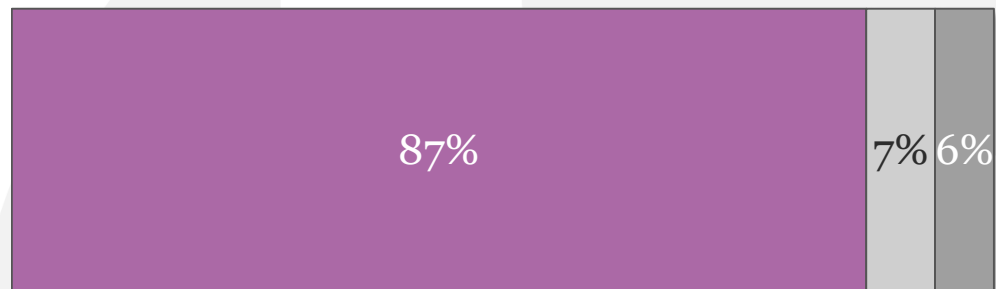
"In some Canadian jurisdictions, it is permissible for consumers to order wine for delivery directly from Canadian wineries in any province. Is this service available where you live?"



Opinion on Restrictions for Direct Purchasing From Wineries

- Nearly all Canadians (87%) believe that consumers should be permitted to order wine for delivery to their home from any Canadian winery located in any province – similar to the American model.

“Consumers living anywhere in Canada should be permitted to order wine for delivery to their home from any Canadian winery located in any province.”



■ Agree

■ Disagree

■ Don't know

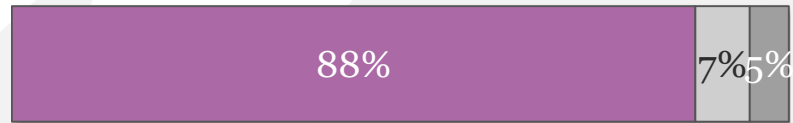
“In the United States, most consumers are free to order wine for delivery from any winery in any state. However, in seven of ten Canadian provinces, it is illegal for consumers to order wine for delivery from an out-of-province winery. Please tell us your opinion with respect to the following statement:”



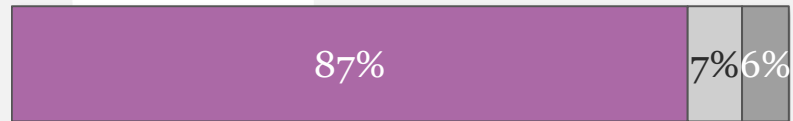
Reasons to Allow Direct Purchasing From Wineries

- Canadians see obvious advantages in terms of selection, convenience, and growth within Canada's wine industry – an industry that they revere.

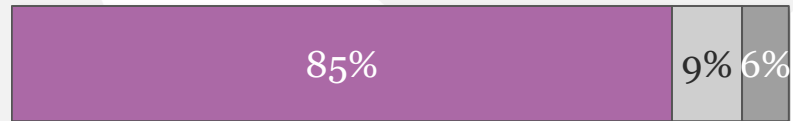
Canada's agriculture and wine industries will benefit if there are more ways in which local wine can be purchased



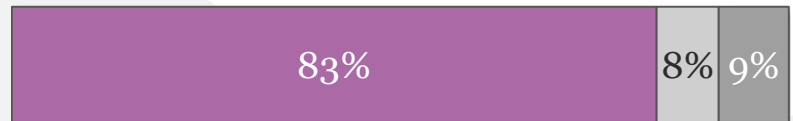
Consumers will have easy access to a broader selection of Canadian wines



Consumers will benefit if there are more convenient ways to purchase Canadian wine



The wine industry in Canada has the potential to grow and be a more robust source of employment



Provincial liquor agencies are not able to offer consumers access to a comprehensive selection of wines from every Canadian winery



■ Agree

■ Disagree

■ Don't know

"The following are some reasons people give for why consumers should be allowed to order wine for delivery directly from Canadian wineries. Please tell us whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each."



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THANK YOU

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