



## Bursting the Bubbles

- Consumer insights on Ontario sparkling wine highlight opportunities -

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## Acknowledgements

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## Overview

Two studies:

1. Basic consumer intelligence on Ontario market
2. Impact of label information

- Context
- Research objectives
- Approach
- Findings
- Concluding comments

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## STUDY 1:

### UNDERSTANDING YOUR MARKET – ONTARIO SPARKLING WINE CONSUMERS

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## Context

- Remarkable growth in volume and quality over last several yrs.
  - over 90 wineries (2018)
- Industry wishes to grow the Ontario market
- Absence of data on Ontario sparkling wine consumers and non-consumers (who, what, where, why ....)
  - Info necessary to guide style development, consumer-centric marketing and growth



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## Research Objectives

- Better describe Ontario consumers of sparkling wine
- Determine consumer behavior (incl. intake & preferences), knowledge, and attitudes concerning Ontario sparkling wines
  - current consumers
  - 'rejectors'
- Explore the importance of intrinsic and extrinsic factors associated with sparkling wine purchase decisions



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## Methodological approach

- Online survey of 1300 Ontario wine consumers (March 2020)
  - Dynata™ (online market research firm)
    - Provide the sample and send survey link
  - Qualtrics™ (survey platform)
- Tools
  1. Standard demographic & wine/fizz purchase, consumption & preference questions
  2. Wine involvement & fizz knowledge questions
  3. Perceptions about Ontario fizz (CATA & free text questions)
- Data compiled and cleaned
  - Responses removed if time to completion < 120 secs (n=36); usable n = 1292
  - Coded & scored
    - Scores calculated for wine knowledge and involvement
    - Preferred wine region and styles
- Summary/descriptive statistics



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## Purchase channels


Where do you buy your sparkling wine from?  
(only select options that apply)

LCBO store	<input checked="" type="checkbox"/> All of the time
LCBO online	<input type="checkbox"/> Most of the time
Other online source, including wine club	<input type="checkbox"/> Some of the time
Winery store	<input type="checkbox"/> Never
Pub	<input type="checkbox"/>
Restaurant	<input type="checkbox"/>
Other	<input type="checkbox"/>

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On average, how often do you drink sparkling wine?

Never  
Once a year  
2-4 times a year  
5-10 times a year  
Once a month  
2-3 times a month  
1-2 times a week  
More than twice a week

0%  100%

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On days when you drink sparkling wine how many standard drinks do you consume?  
(a standard drink is 5 oz. wine)

1  
2  
3  
4  
5 (a bottle)  
More than 5

0%  100%

10

When buying sparkling wine, how much do you typically pay per 750mL bottle (or equivalent)?

☐ \$8-14.99  
☐ \$15-19.99  
☐ \$20-24.99  
☐ \$25-29.99  
☐ \$30-39.99  
☐ \$40 or more

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How much of the sparkling wine that you buy and/or drink is from the following regions?  
(Total should equal 100%)

	0%	25%	50%	75%	100%
Ontario	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Elsewhere in Canada	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I don't know where the wine is from	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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When drinking sparkling wine, how often is it:  
(leave blank if you never drink or don't know)

Prosecco (from Italy)	<div>All the time</div>
Champagne (from France)	<div>Most of the time</div>
Cava (from Spain)	<div>Some of the time</div>
Sekt (from Germany)	<div>Rarely</div>
Asi (from Italy)	<div></div>
Crémant (from France)	<div></div>
Australian sparkling wine	<div></div>
Other	<div></div>

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Please read each statement carefully and select the most appropriate response

**Wine Involvement**  
10 questions  
(adapted from Bruwer et al., 2012)

Please rate how strongly you agree or disagree with the statements below.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
I have a strong interest in wine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drinking wine gives me pleasure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine is important to me in my lifestyle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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What do you think of sparkling wine from Ontario?

0% Survey Completion 100%

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**Objective sparkling wine knowledge**  
( 6 questions)

The process of aging sparkling wines on lees (or dead yeast cells) is called "Charmat"

☐ True  
☐ False  
☐ I don't know

In sparkling wine made using the "Traditional Method", the bubbles are produced from a fermentation that takes place in the bottle

☐ True  
☐ False  
☐ I don't know

Trident Estate and Kempen Vineyards are 2 of Ontario's main sparkling wine producers

☐ True  
☐ False  
☐ I don't know

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### Determining style preferences

How much do you like the following styles of Ontario sparkling wines?

Sweet, perfumed and less fizzy (like Moscato or Asti)	<input type="radio"/> Dislike extremely <input type="radio"/> Dislike very much <input type="radio"/> Dislike moderately <input type="radio"/> Dislike slightly <input type="radio"/> Neither like nor dislike <input type="radio"/> Like slightly <input type="radio"/> Like moderately <input type="radio"/> Like very much <input type="radio"/> Like extremely <input type="radio"/> I have never tried this style
Pét-nat (cloudy 'naturally sparkling' wine)	
Champagne style (dry, bready, yeasty)	
Light & fruity (like Prosecco)	
Other (please state) <input type="text"/>	

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### Typical price-point

When buying Ontario sparkling wine, how much do you typically pay per 750mL bottle (or equivalent)?

☐ \$10-14.99  
☐ \$15-19.99  
☐ \$20-24.99  
☐ \$25-29.99  
☐ \$30-\$39.99  
☐ \$40-\$9.99  
☐ \$60 or more

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### Price-point sensitivity

Would you be willing to pay more for a higher quality Ontario sparkling wine?

☐ Yes  
☐ No  
☐ Maybe



What is the most you would be prepared to pay for an Ontario sparkling wine?

Type in a dollar amount

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Why don't you buy or drink Ontario sparkling wine?  
(select all that apply)

<input type="checkbox"/> Can never find it	<input type="checkbox"/> Can't afford it
<input type="checkbox"/> I'd rather stick with wine that I know	<input type="checkbox"/> Didn't know we made any
<input type="checkbox"/> Don't like the taste	<input checked="" type="checkbox"/> Other reason
<input type="checkbox"/> It's not good value for money	



For Ontario fizz  
'rejectors'

Please explain why you don't buy or drink Ontario sparkling wine

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**Intrinsic & extrinsic factors driving sparkling wine purchase**

**Q1** Please select the factors (if any) that are important to you when considering which sparkling wine to buy and/or drink

<input type="checkbox"/> Label design	<input type="checkbox"/> Bottle shape	<input type="checkbox"/> Match with food	<input type="checkbox"/> The style of wine
<input type="checkbox"/> Bottle size	<input type="checkbox"/> How the wine was produced (e.g. bottle-fermented)	<input type="checkbox"/> Flavour	<input type="checkbox"/> What I expect it to taste like
<input type="checkbox"/> The appellation or sub-region the wine is from	<input type="checkbox"/> The country the wine is from	<input type="checkbox"/> Colour	<input type="checkbox"/> Aroma/smell
<input type="checkbox"/> Label information	<input type="checkbox"/> Bottle colour	<input type="checkbox"/> The quality	<input type="checkbox"/> Differences (the type of foam and fineness from the bubbles)
<input type="checkbox"/> Grapes variety/blend	<input type="checkbox"/> Ease of use (e.g. how easy to open the bottle)	<input type="checkbox"/> The sweetness level	<input type="checkbox"/> Vintage/year produced
<input type="checkbox"/> Expert reviews	<input type="checkbox"/> Who I'll be drinking it with	<input type="checkbox"/> Alcohol content	
<input type="checkbox"/> Price	<input type="checkbox"/> The wine company/brand		
<input type="checkbox"/> The reputation of the wine	<input type="checkbox"/> The occasion (e.g. whether buying as a gift or celebration)		
<input type="checkbox"/> Awards, stars, etc won by the wine	<input type="checkbox"/> Whether or not it is VQA-certified		
<input type="checkbox"/> Advice from others (e.g. friends, LCBO staff)	<input type="checkbox"/> The prestige of the wine		

**Q2** Please select the MOST important factors to you when considering which sparkling wine to buy and/or drink (select up to 5)

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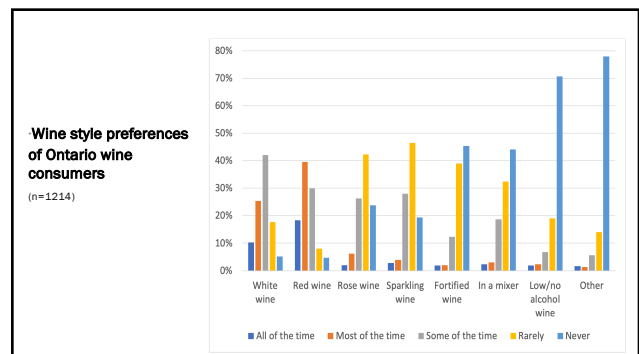


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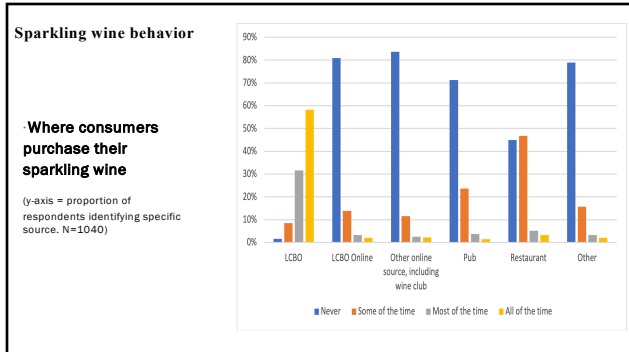
**Sociodemographic and behavioural characteristics of participants**

		Frequency	Proportion (%)
Gender	Male	641	49.5
	Female	648	50.0
	Other/prefer not to say	6	0.5
Age (yrs)	20-34	176	15.0
	35-49	298	25.3
	50-59	259	22.0
	60-69	282	24.0
	70+	162	13.8
Income (CAD)	Under 25k	86	6.7
	25-45k	174	13.5
	46-65k	203	15.7
	66-85k	206	16.0
	86-100k	201	15.6
	101-200k	348	27.0
	200k+	73	5.7
Education	High school cert./equivalent or less	190	14.7
	Apprenticeship or trades certificate/diploma	55	4.3
	College qualification	331	25.6
	University undergraduate qualification	397	30.1
	University graduate qualification	321	24.8
Wine Involvement	Low	422	33.8
	Medium	709	56.8
	High	118	9.5
Wine intake	Less than once a week	284	22.0
	1-2 times a week	517	40.0
	3-4 times a week	205	15.9
	5-7 times a week	182	14.0
	More than 7 times a week	105	8.1

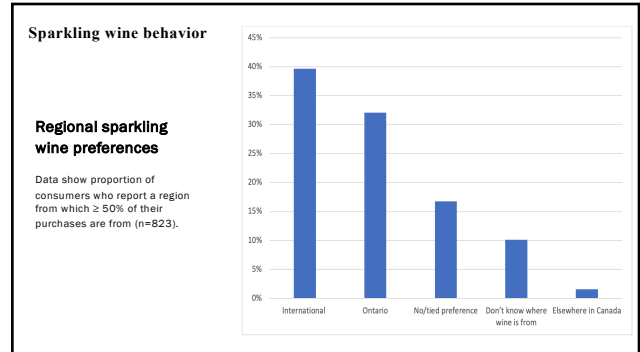
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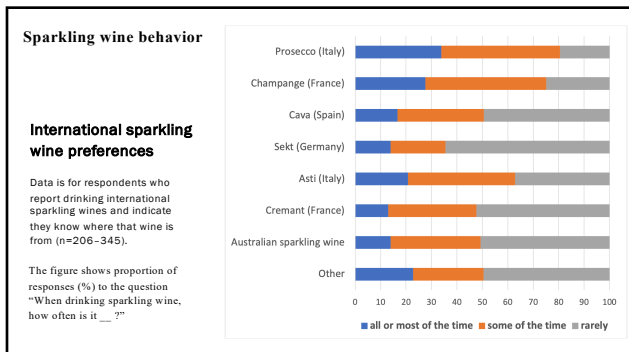
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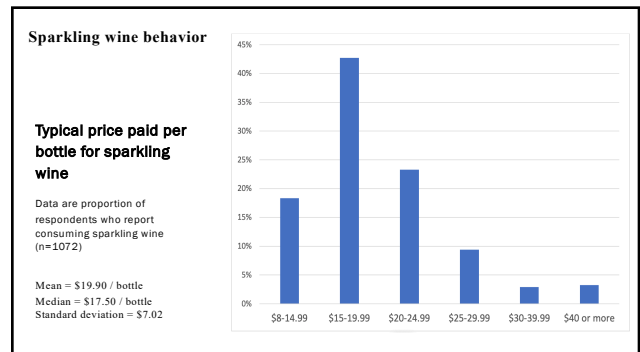
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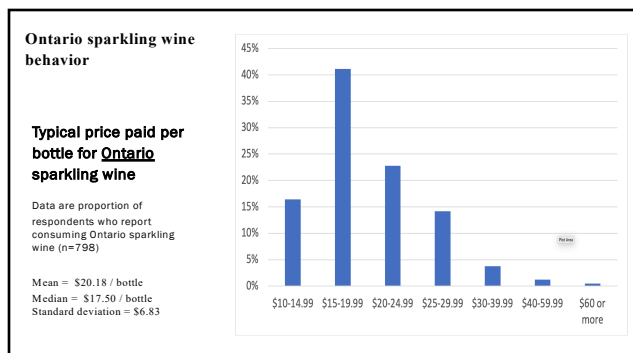
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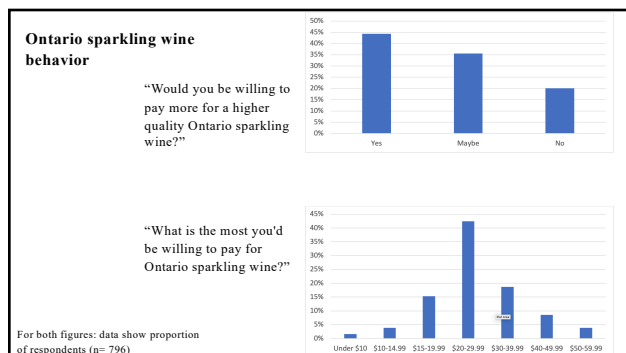
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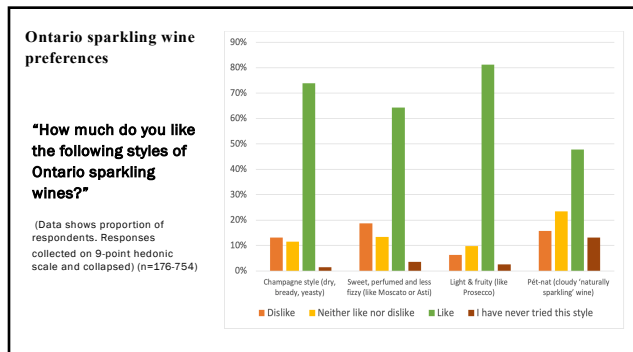
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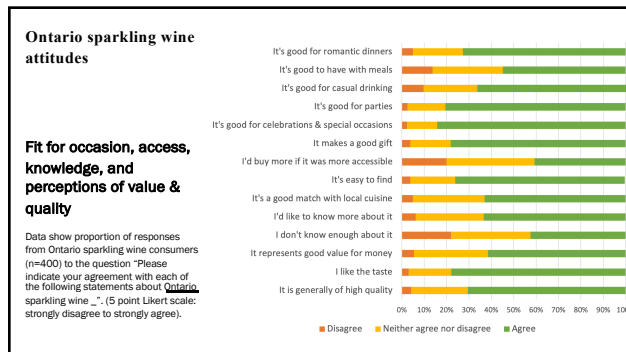
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Ontario sparkling wine rejectors		Consumers (n=597)	Rejectors (n=168)
Gender (%)	Male	51	47
	Female	49	53
Age (yrs.)		50	56
Income (CAD)*		93,600	104,300
Education (% of respondents)	High school cert./equivalent or less	11	11
	Apprenticeship or trades certificate/diploma	3	3
	College qualification	25	27
	University undergraduate qualification	34	33
	University graduate qualification	27	27
Wine Involvement (% of respondents)	Low	24	43
	Medium	63	48
	High	13	10
Sparkling wine intake – frequency of consumption (% of respondents)	At least weekly	6	2
	1-3 times a month	23	16
	5-10 times a year	18	16
	2-4 times a year	38	41
	Once a year	16	26
Sparkling wine intake – standard drinks per year		31	21
Price (CAD) typically paid for sparkling wine ('bottle')		\$20.4	\$20.2
Sparkling wine knowledge (% of respondents)**	Low	25	44
	Medium	55	44
	High	20	13

\* Estimates only; data extrapolated from categorical responses  
 \*\* Based on responses to a series of questions on objective knowledge

### Characteristics of consumers and non-consumers (rejectors) of Ontario sparkling wine

Wine style	Frequency of intake	Consumers (n=597)	Rejectors (n=168)
Prosecco	All or most of time	31	51
	Some of time	50	30
	Rarely	19	19
Champagne	All or most of time	29	21
	Some of time	49	39
	Rarely	22	40
Cava	All or most of time	16	18
	Some of time	37	18
	Rarely	47	64
Sekt	All or most of time	16	5
	Some of time	25	5
	Rarely	60	90
Auti	All or most of time	22	14
	Some of time	43	34
	Rarely	34	52
Crémant	All or most of time	15	5
	Some of time	40	8
	Rarely	46	87
Australian	All or most of time	16	5
	Some of time	38	18
	Rarely	46	77
Other	All or most of time	25	8
	Some of time	31	8
	Rarely	44	85

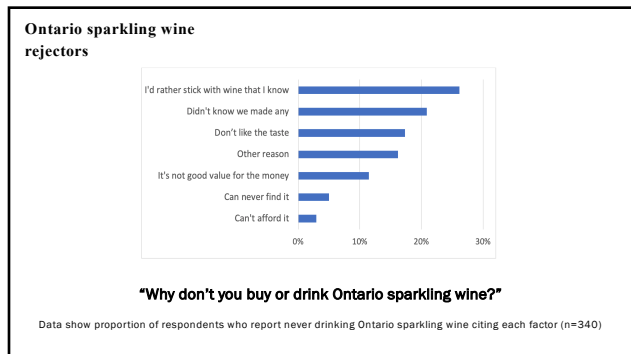
### Ontario sparkling wine rejectors

### Comparison of international sparkling wine consumption patterns between Ontario sparkling wine consumers and non-consumers

Data shows frequency of intake (%) for respondents who reported drinking each style

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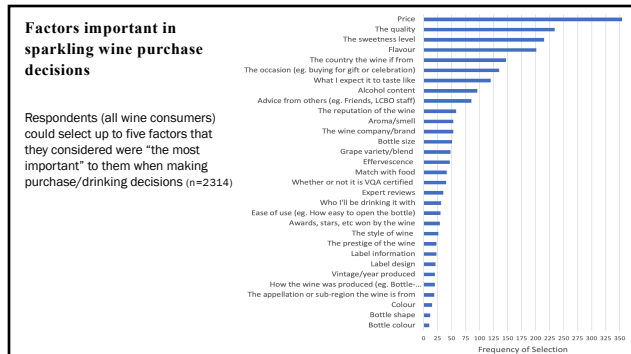
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Category & Subcategory	Qualifiers	Example	Prevalence (% responses)
Prefer international sparkling wines	Respondents reference a preference for international wine	"I like international much better" "I only drink Italian"	30%
Ontario sparkling wine is poor quality	Respondents reference quality of Ontario sparkling wine; Ontario wine producers low standards; comparison to international standards/quality	"They are very poor quality compared to international blends" "Ontario producers have low standards and it shows in their product"	22%
Ontario sparkling wine is overpriced/expensive	Respondents reference Ontario sparkling wine being overpriced; Ontario sparkling wines being too expensive; Ontario sparkling wine overpriced in comparison to other sparkling wines	"Ontario wine is overpriced when compared to wines from other areas" "Too expensive compared to others for the same taste"	17%
Not enough exposure to it or have not tried it	Respondents reference not trying Ontario sparkling wine; haven't tried it enough; limited selection in LCBO	"I haven't taken the time to try it"; "I haven't had the opportunities to try enough samples"; "I've never been offered any to try in a store"; "I don't see any commercials for it"	16%

### Ontario sparkling wine rejectors

### Additional reasons cited by Ontario sparkling wine rejectors (n=60)

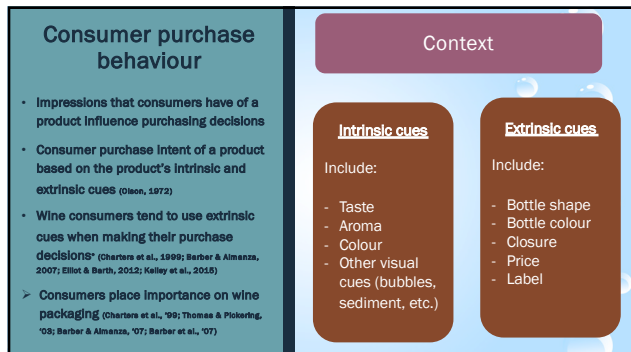
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**The importance of the wine label**

Wine label design	Wine label information
<ul style="list-style-type: none"> <li>Illustrations</li> <li>Colours</li> <li>Shapes</li> <li>Font style, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Brand name</li> <li>Wine attributes</li> <li>Production process</li> <li>Varietal/blend, etc.</li> </ul>

- Wine label information more important to consumers when making decisions to buy wine (Barber & Almanza, 2007; Barber et al., 2007; Sherman & Tuten, 2011)
- Different types of wine label information matter more than others (Thomas & Pickering, 2003)
- Very little info on the importance of sparkling wine label information and on specific informational elements to consumer perceptions and purchase behavior
  - Of interest to Ontario industry segment interested in increasing growth/value
  - Findings potentially very actionable

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### Information elements on wine labels

Information type	Information elements
Endorsements	Expert endorsements (E.g., awards, expert opinions)
Parentage	Wine region history Winemaker history Brand name Wine company
Attributes	Wine's attributes (E.g., taste and flavour descriptors)
Target - end use	How to use the wine (E.g., food pairings)
Target - end user	What occasion the wine is for Who the wine would appeal to
Manufacture	How the wine is made (production process)
Non-parcell	A statement that the wine is unrivalled or unique
Additional information	Alcohol content Grape variety/blend Vintage/year

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### Research objectives



- Determine the relative importance of different information elements on wine labels to sparkling wine consumers from Ontario
  - *perception of quality*
  - *willingness to buy*
  - *price willing to pay*
- Determine variability due to:
  - *sociodemographic groups*
  - *involvement, purchase behavior, wine knowledge*
  - *wine style ('Champagne'-like v 'Prosecco'-like)*

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### Methodological approach



- Online survey of Ontario sparkling wine consumers (April 2020)
  - *Dynata™* and *Qualtrics™*
- Tools
  1. Sociodemographics, involvement, purchase behavior, wine knowledge
  2. Two experimental approaches to determine importance of label information
    1. Respondents rate the importance they place on info elements (5-point Likert scale)
    2. Experimental manipulation where consumers respond to mock labels
- Data compiled and cleaned (< 200 secs removed; median completion time 5.3 mins)
  - Usable sample of 576
  - Coded & scored where needed
- Self-reported importance ratings: Two- way Analysis of Variance (XLSTAT)
- Label treatment experiment: One- and two- way Analysis of Variance (XLSTAT)

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### Subjective wine knowledge

Please rate your level of sparkling wine expertise:

☐ Novice/Beginner

☐ Intermediate

☐ High

☐ Expert/Very high

0%  100%

→

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Style preference  
(for 2<sup>nd</sup> study)

Which of the following sparkling wine styles do you prefer?

☐ Fruity, sweeter sparkling wine styles (e.g. Prosecco, Asti)

☐ Creamy, bready, drier, sparkling wine styles (e.g. Champagne, Crémant)

☐ I don't know

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Sparkling wine involvement

Please rate how strongly you agree or disagree with the statements below.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

Sparkling wine is important to me in my lifestyle

☐

☐

☐

☐

☐

I have a strong interest in sparkling wine

☐

☐

☐

☐

☐

Drinking sparkling wine gives me pleasure

☐

☐

☐

☐

☐

(adapted from Bruwer et al., 2012)

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Label manipulation experiment design

Label treatments: Control, 01-07

Prosecco style wine label (fruity, sweeter)

Champagne style wine label (bready, dry)

Version 1

Version 2

Version 1

Version 2

Different expressions of parentage, endorsements, and attribute information.

Different expressions of parentage, endorsements, and attribute information.

Treatment Code	Informational element excluded	Colour code for following figure
C	None (Control – all elements included)	
O1	Endorsements	
O2	Parentage	
O3	Attributes	
O4	Target – end user	
O5	Target – end user	
O6	Manufacture	

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Label manipulation experiment

Mock wine labels  
(highlights included for illustration only)

a)

Recommended Wine Storage Regulator

STONE ARROW VINEYARDS

CHATEAU METHOD

Sticker's Chardonnay 2015

VQA NIAGARA PENINSULA VQA

10.5% alc./vol 750mL

The Niagara Peninsula has been crafting wines of exceptional quality for decades. Our winemaker Adam continues this tradition each vintage, as he has since the very beginning. This wine was produced from hand-harvested Chardonnay grapes that underwent secondary fermentation in a stainless steel tank using the Chateau Method.

This crisp and elegant wine has a smooth texture with just the right amount of sweetness. This wine will appeal to the sophisticated sommelier who also enjoys the good things in life. It is perfect on its own with friends on the patio. This wine is truly unique.

b)

90 POINTS

STONE ARROW VINEYARDS

TRADITIONAL METHOD

Sticker's Chardonnay 2015

VQA NIAGARA PENINSULA VQA

12.5% alc./vol 750mL

Since 2001, our winemaker Megan has been producing excellent wines right here on our estate in the Niagara Peninsula overlooking Lake Ontario. These Chardonnay grapes were hand-picked and whole cluster pressed. The secondary fermentation was finished in bottle using the Traditional Method.

This dry sparkling wine exhibits notes of honeycomb, melon, and toasted brioche. This wine will appeal to the sophisticated sommelier who also enjoys the good things in life. It is perfect served chilled as an aperitif or a companion to seafood. The complexity of this wine is unmatched.

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**Measures of purchase intent & quality**

How likely would you be to purchase this wine?

☐ Very unlikely  
☐ Unlikely  
☐ Somewhat unlikely  
☐ Neither likely nor unlikely  
☐ Somewhat likely  
☐ Likely  
☐ Very Likely

Please rate what you believe the quality of this wine is:

☐ Excellent  
☐ Good  
☐ Average  
☐ Below average  
☐ Poor

How much would you be willing to pay for this sparkling wine? Please enter a whole number

\$

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**Self-rated importance of label elements**

When thinking about buying dry, creamy, breadly sparkling wine styles (e.g. Champagne, Crémant), rate the importance that you place on each of the following pieces of information found on labels.

	Not at all important	Slightly important	Moderately important	Very important	Extremely important
Wine region history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine maker history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand name	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How the wine is made (production process)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine's attributes (E.g. taste and flavour descriptions)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How to use the wine (E.g. food pairings)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What occasion the wine is for	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Who the wine would appeal to	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expert endorsements (E.g. awards, expert opinions)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A statement that the wine is unvalued or unique	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alcohol content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grape variety/blend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vintage/year	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**2 wine styles used in cue, depending their style preference:**

"fruity, sweeter sparkling wine styles (e.g. Prosecco, Asti)"

"dry, creamy, breadly sparkling wine styles (e.g. Champagne, Crémant)"

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**Characteristics of sample**

		Frequency	Proportion (%)
<b>Gender</b>	Male	282	49
	Female	294	51
<b>Age</b>	18-25	31	5.4
	26-35	106	18.4
	36-45	107	18.6
	46-55	116	20.1
	56+	216	37.5
<b>Income (K\$)</b>	Under 25k	34	5.9
	25-45k	55	9.6
	46-65k	78	13.6
	66-85k	96	16.8
	86-100k	94	16.4
	101-140k	121	21.1
	141-200k	69	12.0
	200k+	26	4.5
<b>Subjective Knowledge</b>	Novice/beginner	214	37.2
	Intermediate	275	47.7
	High	75	13.2
	Expert/Very High	11	1.9
<b>Objective Knowledge</b>	Beginner	209	36.3
	Intermediate	281	48.8
	High	86	14.9
<b>Wine Involvement</b>	Low	76	13.2
	Medium	334	58.0
	High	166	28.8

		Frequency	Proportion (%)
<b>Sparkling Wine Involvement</b>	Low	174	30.2
	Medium	303	52.6
	High	99	17.2
<b>Alcohol Intake</b>	Less than once a month	30	5.2
	One a month	26	4.5
	2-4 times per month	148	25.7
	2-4 times per week	258	44.8
	More than 4 times per week	114	19.8
<b>Sparkling Wine Intake</b>	Once a year	97	16.8
	2-4 times per year	152	26.4
	5-10 times per year	88	15.3
	Once a month	96	16.7
	2-3 times a month	95	16.5
	One or more times per week	48	8.3
<b>Preferred Sparkling Wine Style</b>	Fruity, sweeter, sparkling wine (e.g. Prosecco)	351	60.5
	Creamy, breadly, drier, sparkling wine (e.g. Champagne)	205	35.6
	Unsure	20	3.5
<b>Price typically paid per bottle of sparkling wine</b>	\$5-\$14.99	76	13.2
	\$15-19.99	221	38.4
	\$20-24.99	149	25.9
	\$25-30.99	66	11.3
	\$30-39.99	37	6.4
	\$40-49.99	10	1.7
	\$50+	17	3.0

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## Label information importance ratings

Information element	Mean	Information type	Groups
Wine's attributes	3.61	Attributes	A
Grape variety/blend	3.46	-	B
Wine region history	3.26	Parentage	B C
Alcohol content	3.26	-	B C
Wine company	3.22	Parentage	C D
What occasion the wine is for	3.21	Target - end use	C D
How the wine is made	3.21	Manufacture	C D
Vintage/year	3.20	-	C D
Brand name	3.19	Parentage	C D
How to use the wine	3.15	Target - end user	C D
Who the wine would appeal to	3.03	Target - end use	D E
Winemaker history	3.02	Parentage	D E
Expert endorsements	2.90	Endorsements	E F
Unique or unvalued	2.74	Non-pareil	F

Note: the importance scores were collected on a 5-point Likert scale

■ Wine attributes rated significantly higher than all other information elements

■ Expert endorsements and non-pareil information show low importance

■ Parentage is not rated as a single entity

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## Importance of info elements varies with preferred style

Mean importance ratings ranked from most to least important based on preferred sparkling wine style.

Information element	Importance ratings: <i>Traditional style</i> (n = 350)	Information element	Importance ratings: <i>Champagne style</i> (n = 202)
Wine's attributes	3.83	Wine's attributes	3.78
Grape variety/blend	3.41	Grape variety/blend	3.55
Alcohol content	3.36	Vintage/year	3.32
Wine company	3.24	How the wine is made	3.32
Wine region history	3.23	Wine region history	3.32
What occasion the wine is for	3.23	Brand name	3.25
How to use the wine	3.15	Wine company	3.19
Brand name	3.15	What occasion the wine is for	3.17
How the wine is made	3.14	How to use the wine	3.15
Vintage/year	3.13	Winemaker history	3.12
Who the wine would appeal to	3.04	Alcohol content	3.09
Wine maker history	2.960	Who the wine would appeal to	2.955
Expert endorsements	2.860	Expert endorsements	2.970
Unique or unvalued	2.774	Unique or unvalued	2.673

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## Importance of info elements varies with consumer age

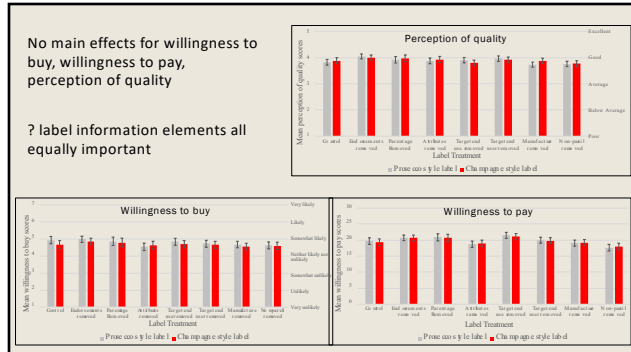
Mean importance ratings ranked from most to least important for the 18-25 and 56+ age groups.

Information element	Importance ratings: <i>age 18-25 yrs</i>	Information element	Importance ratings: <i>age 56+ yrs</i>
Wine's attributes	4.07	Wine's attributes	3.63
Alcohol content	3.64	Grape variety/blend	3.36
Who the wine would appeal to	3.58	Wine region history	3.17
What occasion the wine is for	3.55	What occasion the wine is for	3.11
Brand name	3.48	Vintage/year	3.10
Wine company	3.45	Brand name	3.08
Grape variety/blend	3.42	Alcohol content	3.06
How to use the wine	3.42	Wine company	3.05
Expert endorsements	3.36	How the wine is made	3.03
Wine region history	3.32	Winemaker history	2.92
Vintage/year	3.29	How to use the wine	2.89
How the wine is made	3.29	Who the wine would appeal to	2.84
Unique or unvalued	3.10	Expert endorsements	2.70
Winemaker history	3.00	Unique or unvalued	2.64

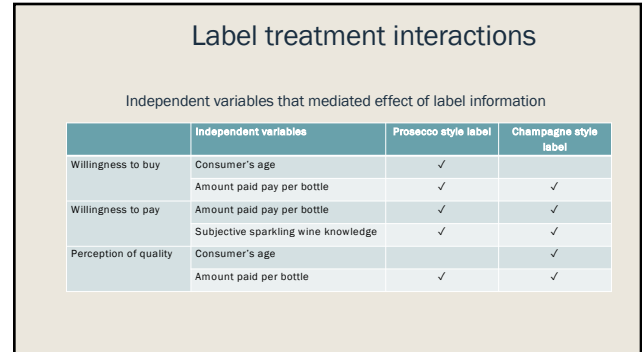
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## Label manipulation experiment

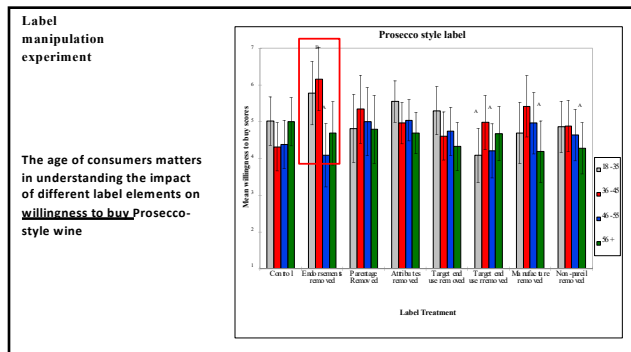
56



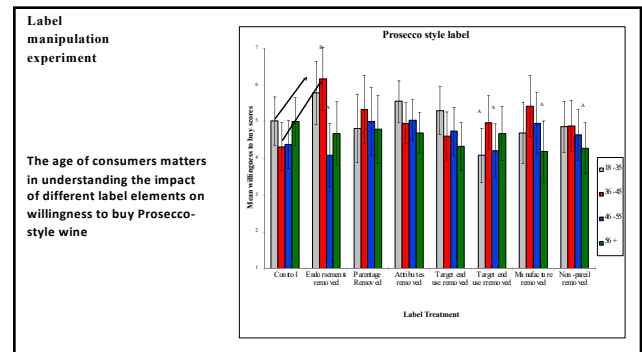
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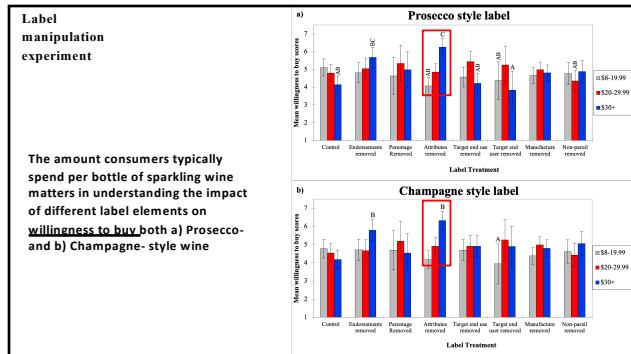
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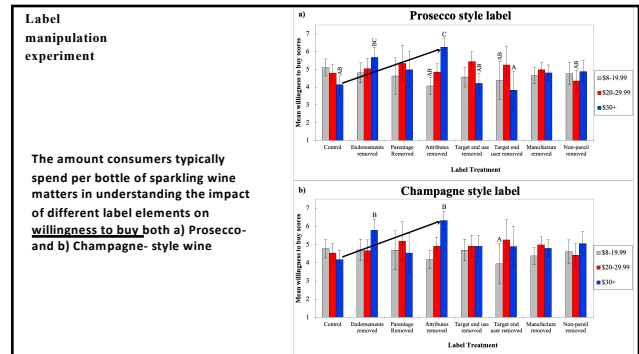
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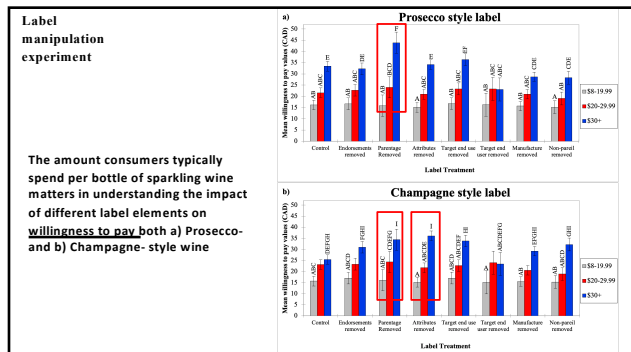
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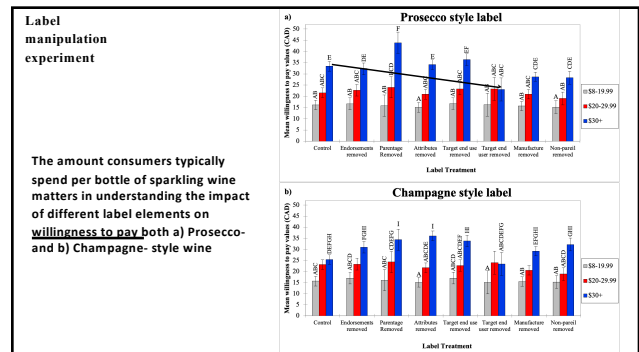
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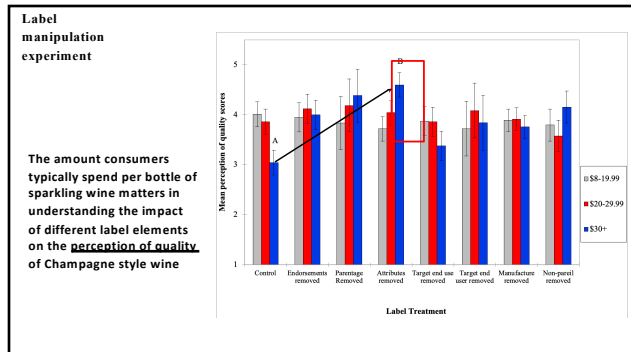
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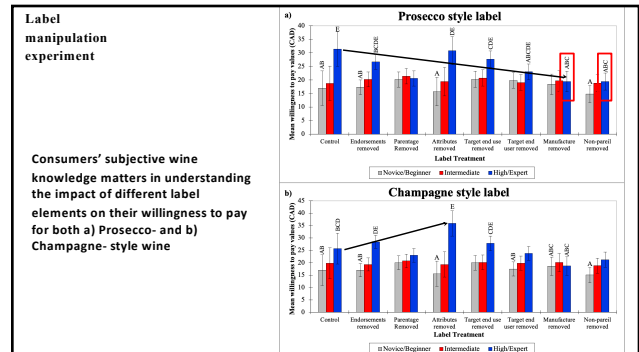
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## Summary

- Two-thirds of Ontario wine consumers rarely or never drink sparkling wine.
- The four major Ontario sparkling wine styles are all scored relatively high for liking by current consumers.
- Ontario sparkling wine is perceived by current consumers as good for celebrations and special occasions (84%), good for parties (81%), good as a gift (78%), and generally of high quality (71%).
- 80% of current consumers are willing to pay more or open to the possibility for Ontario sparkling wine, although limited accessibility is identified by many consumers and is a barrier to further growth.
- Both current consumers of Ontario sparkling wine and those who do not drink it indicate a lack of knowledge about the product as a limiting factor in their purchase behaviour/intent, suggesting that significant benefit can be realised by filling this knowledge gap.
- 26% of sparkling wine consumers do not drink Ontario sparkling wine. Sticking with what they know, and not knowing that Ontario makes sparkling wine, are the most frequently cited reasons. These 'rejectors' have actionable demographic and behavioural characteristics and represent a further growth opportunity. For instance, these individuals prefer Prosecco-style wines.

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## Summary

- 14 label elements self-rated for importance by Ontario fizz consumers
  - Wine's attributes & grape variety/blend most important; endorsements & non-pareil least
  - Relative importance varies with preferred style & particularly consumer age
    - E.g. Prosecco-style preferers place more importance on alcohol content
    - E.g. Younger consumers place more importance on 'who the wine would appeal to'
- Ontario consumers who typically spend the most per bottle of sparkling wine (\$30+) are the most sensitive to specific label information elements
- While a description of a wine's attributes is the most important self-rated information component of labels, this is strongly dependent on how much consumers spend per bottle of sparkling wine.
  - Attribute description may adversely impact willingness to buy, willingness to pay, and perception of quality for those who spend \$30+
- Expert endorsements are relatively unimportant to the purchase decisions of sparkling wine consumers, and their inclusion on labels may have a negative effect on the purchase intent of younger consumers.

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### Final thoughts and recommendations

- Significant potential for growth of sparkling wine in Ontario
- Sparkling wine label information matters for Ontario consumers. Some elements matter more.
- KNOW your target market and design your labels strategically
- Description of the wine's attributes important for many consumers, but
  - *may be a discrepancy between what consumers think is important to them and how they act*
  - *avoid wine attribute info for fizz priced \$30+*
- Apply caution with use of parentage info with \$30+ product
- Label emphasis should change when target market is younger consumers
  - *include information on who the wine would appeal to*
  - *avoid expert endorsements or award information*
- Generally advantageous to include info on wine region, grape variety/blend, and winery/wine company
- Further work: (1) *How best to exploit the (reported) willingness to pay more for Ontario fizz*, (2) *Further test validity & generalisability of mock labels; importance of bottle & label design & region specificity*

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### Bursting the Bubbles

- Consumer insights on Ontario sparkling wine highlight opportunities -

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