An investigation into consumer attitudes toward vegan and vegetarian wine in Canada.

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Table of contents

List of Tables

List of Figures

1. Summary

There has been a significant increase in animal-free food consumption in Canada (Charlebois, et al., 2018), and global interest in vegan and vegetarian wine (VVW) (Halstead, 2018). While animal-free food consumption trends may translate into demand for VVW, research shows that stigma may be associated with veganism (Crosariol, 2018; Dhont & Stoeber, 2020; Markowski & Roxburgh, 2019; Potts & Perry, 2010).

The purpose of this research is to investigate Canadian consumer attitudes toward VVW by establishing whether they hold positive, negative or neutral attitudes toward the category, the reasons for their attitudes, their ranking of vegan and vegetarian winemaking among other choice attributes and their preferred label term.

The study finds that more than one in five consumers have positive attitudes toward VVW, including a higher share of consumers age 19–34 and those with diets that avoid or limit animal consumption. In contrast, more than one-third of consumers, including a higher share of omnivores have negative attitudes toward VVW. This research recommends for a VVW category to be developed within the larger non-VVW range in Canada.

2. Introduction, aims and objectives

2.1 Animal-free food consumption in Canada

In the 15 years before 2018, the number of vegetarians in Canada increased by 156% to 2.3 million (Charlebois cited in Flanagan, 2018). A further 850,000 Canadians, approximately 2.3% of the population, are vegan (Crosariol, 2018; Flanagan, 2018) and a third of Canadians are considering reducing their meat consumption in the next six months (Charlebois, et al., 2018). Altogether, 9.4% of the Canadian population is vegan or vegetarian (Charlebois cited in Flanagan, 2018). The majority of Canadians who identify as vegan or vegetarian are age 35 and under, suggesting this consumption trend may increase in the future (Charlebois cited in Flanagan, 2018).

In 2018, sales of animal-free alternatives increased by 14%, compared to little growth in the fast-moving consumer goods category (Nielsen, 2019). While 20% of Canadian households are vegan or vegetarian, 27% purchase meat and dairy-alternatives, indicating a broader appeal of this category to meat-eating consumers (Nielsen, 2019). Food consumption trends in Canada suggest a potential growth opportunity for the VVW category.

2.2 Vegan and vegetarian wine

Many animal-derived substances, such as egg whites, casein, gelatin or isinglass are used as fining agents (AWRI, 2020; Krebiehl, 2018). Winemakers may also choose not to fine or to use a non-animal fining alternative such as carbon, polyvinylpolypyrrolidone, or pea or potato protein resulting in wines that can be considered vegan or vegetarian (AWRI, 2020; Krebiehl, 2018; Segade et al., 2020).

2.3 The Canadian wine industry

The Canadian wine industry is a significant contributor to the domestic economy, as well as a valuable export market for many wine-producing countries. Wine sales in Canada have grown an average of 4.2% per year over the past decade with $7.5 billion (CAD)[1] of wine sold in the 12 months leading up to March 2018 (Statistics Canada, 2019). While the 16.7 million Canadian consumers (Wine Intelligence, 2018) purchase slightly more domestic wine than imported (Statistics Canada, 2019), the country is considered the sixth most attractive export market in the world (Loose & Pabst, 2018). Currently, none of Canada's three largest liquor boards, the Liquor Control Board of Ontario (LCBO) (LCBO, 2020), the British Columbia Liquor Distribution Branch (BCLDB) (British Columbia Liquor Distribution Branch, 2020) or the Société des alcools du Québec (SAQ) (SAQ, 2020), offer a VVW category.

2.4 Aims and objectives

The significance of the Canadian wine industry (Statistics Canada, 2019) and the rise in animal-free food consumption in the country (Charlebois, et al., 2018) establish a need to understand consumer attitudes toward VVW. Concerning Canadian wine consumers, this research aims to answer the following questions:

1) Do they hold positive, negative or neutral attitudes toward VVW?

2) What reasons do they provide for their attitudes toward VVW?

3) Which attribute, if any, is more important to them: VVW, brand, variety or region?

4) Which label term, if any, do they prefer: vegan-/vegetarian-friendly, vegan-/vegetarian-certified, animal-free or plant-based?

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[1] The currency referenced throughout this research is in Canadian dollars (CAD) unless otherwise stated.

The objective of this research is to expand the current body of knowledge by examining the current VVW market in Canada, the potential for VVW and Canadian consumer perspectives by age, province, income, gender and consumption group. No prior research has studied both positive and negative attitudes toward VVW in Canada as well as examined the market by province, consumption and income group. The research at hand is also the first to examine purchase motivations, purchase barriers and label preferences for VVW in Canada. This research is necessary to establish whether a larger opportunity exists for VVW within Canada and to determine its scale. Conclusions formulated from this research will inform those who sell wine in Canada, allowing them to better meet the needs of consumers. Further understanding may be gained by applying the following research methodology to other markets.

3. Literature review

3.1 Global animal-free consumption

International interest in animal-free consumption is rising. Seven times as many vegan-related google searches occurred in 2019 compared to 2015 (The Vegan Society, 2020). The Economist labelled 2019 'The Year of the Vegan' and 25% of Americans age 25–34 indicate that they are vegan or vegetarian (Parker, 2019). The upward trend of veganism in Germany can be seen in a significant increase in the number of vegan culinary events and cookbooks published (Gerke & Janssen, 2017). In the United Kingdom (UK), the number of vegans grew from 150,000 to 600,000 in the four years from 2014 to 2018 (2016 Ipsos MORI poll cited in White, 2018). Currently, one in three consumers in the UK are vegan, vegetarian or reducing their meat intake (Southey, 2020).

Global food and beverage companies are capitalizing on the trend. Danone is forecasting sales to accelerate from €2 billion to €5 billion from 2019 to 2025 (Danone, 2018; Morrison, 2020). Sales of meat alternatives are projected to grow at a compound annual growth rate exceeding 7% to reach €6.6 billion by 2025 (Allied Market Research cited in Southey, 2020). The Business Development Bank of Canada advises that companies that respond to consumers' growing health concerns will 'position themselves favourably in the marketplace' (Business Development Bank of Canada, 2013), and Charlebois (cited in Crosariol, 2018) sees a 'bright future' for companies responding to the animal-free consumption trend in Canada.

The increase in plant-based food consumption is driven in part by concern for health and wellness (Picciola, et al., 2019). Aldi buyer Mike James states that consumer interest in vegan wine (VGW) is part of a larger 'good for me, good for the environment' trend (Mileham, 2019). Wine Intelligence (2020B) research reveals that wine consumers are becoming more mindful of ethical consumerism and are shifting purchases toward options that support their concerns for the environment and their health.

Interest in VVW is also associated with concern for allergies (Crosariol, 2018). In Canada, fining agents such as egg, milk and fish are known to be allergens and are therefore required to be identified on wine labels if they are present in wine at 10ppm or more (Government of Canada, 2020).

While animal-free consumption trends may translate into increased demand for VVW, a stigma may be associated with veganism (Crosariol, 2018; Dhont & Stoeber, 2020; Markowski & Roxburgh, 2019; Potts & Perry, 2010). This research will investigate both the positive and negative perspectives consumers hold concerning VVW, to understand whether or not an opportunity in this category exists in Canada.

3.2 The VVW market

Consumer awareness of VGW, fueled by social media, is growing internationally (Halstead, 2018). The trade is optimistic about the potential of VVW and focused consumer marketing could result in category growth (Wine Intelligence cited in Jenkins, 2019). Lynne Coyle MW (Master of Wine) (2015) found that more than a third of Irish consumers preferred a vegan or vegetarian symbol on wine labels. According to Wine Intelligence (2020B), Finland, the USA and Hong Kong are the markets with the most opportunity for VGW, and the USA, Hong Kong and Australia for vegetarian wine (VW).

UK consumer interest in VVW is well established. Andrew Shaw, Buying Director for Bibendum, states '…the trend of veganism has become profound in wine' (Eads, 2018). According to Jancis Robinson MW (2018), Marks and Spencer began to identify VVW in their range over a decade ago, and as a result, many of their suppliers have converted to VVW production. David Gleave MW, Managing Director of Liberty Wines, indicates that the question most asked by customers is whether or not a wine is vegan (Robinson, 2018).

While 9% of Canadian consumers are aware of VGW, and 6% are aware of VW, only 1% of consumers purchased VVW in the past six months (Wine Intelligence, 2019). One in five consumers (21%) indicate that they would be very likely or extremely likely to purchase VVW and 30% considered VVW right for people like themselves (Wine Intelligence, 2019). Of those aware of VGW, 15% purchased and 38% would consider a future purchase (Wine Intelligence, 2019). Of those aware of VW, 16% purchased and 41% would consider a future purchase (Wine Intelligence, 2019).

It might be assumed that due to their consumption preferences, it is largely vegans and vegetarians who are aware of VVW; however, among those aware, fewer than half expressed an intent to purchase (Wine Intelligence, 2019). Possibly, many of those aware of VVW are not vegans or vegetarians, and there may be an opportunity for greater awareness among these consumption groups. Alternatively, consumers across consumption groups may consider vegan or vegetarian winemaking to be less important than other attributes. This research examines the validity of both explanations.

3.3 Transparency in labelling

In the current information age, consumers demand to know more about the products they consume (Dimara & Skuras, 2005; Label Insight, 2016). In the US, 67% of consumers want full disclosure of consumable ingredients (Nielsen/Harris poll cited in Thach, 2020) and 37% are willing to switch to more transparent brands (Label Insight, 2016). In contrast, most of the hundreds of additives used in winemaking are not required to be listed on the labels (Jefford, 2014; Thach, 2020).

Understanding the impact of transparency is particularly important in the wine industry, as consumers tend to simplify winemaking, believing wine is made from fermented grape juice (Battaglene, 2014 cited in Pabst, Szolnoki, & Loose, 2019; Grunert et al., 2018 cited in Pabst, Szolnoki, & Loose, 2019). While wine labelled as animal-free can provide an opportunity for consumer pull (Crosariol, 2018; Thach, 2020), ingredient labelling can reduce the perception of wine as natural (Pabst, et al., 2019), create a negative reaction (Mueller et al., 2010a cited in Pabst, Szolnoki, & Loose, 2019) or even result in lost sales (Yeung & Morris, 2001 cited in Pabst, Szolnoki, & Loose, 2019).

Third-party certification can create consumer trust (Cazrnezki, et al., 2014) especially for a process claim, such as animal-free winemaking, that cannot be organoleptically verified (Bond, et al., 2008). The challenge with certification is that neither the Canadian government (University of Toronto, 2018) nor the International Organization of Vine and Wine (Food Standards Agency, n.d.) defines the terms 'vegan' or 'vegetarian'.

3.4 Literature review summary

The literature review reveals rising global consumer interest in animal-free food consumption, motivated by concern for health and the environment. A demand for heightened transparency in labelling, a significant increase in the sales of animal-free consumables and aggressive growth projections signal the expectation of an opportunity for companies that provide animal-free alternatives. While global interest in VVW is growing, sales in Canada are limited. Compared to the share of Canadian consumers who are currently purchasing VVW, a larger share indicates that they would consider buying VVW. Potential for category growth may be offset by stigma that can be associated with veganism or an adverse effect that ingredient labelling may have on wine sales.

4. Methodology

The methodology was designed to examine Canadian consumer attitudes toward VVW and break down these perspectives by consumption group, age, gender, province and income. The three-phase methodology includes a qualitative consumer survey, a qualitative trade survey and a quantitative consumer survey.

4.1 Definitions

Key terms used in this research are defined in Table 1.

Table 1: Definitions

Term	Definition
Attitudes	The consumer’s intent to purchase and the extent to which they agree that a product is ‘right for people like me’.
Vegetarian wine (VW)	Wine produced without animal products except dairy or egg (Krebiehl, 2018).
Vegan wine (VGW)	Wine made without the use of any animal products (Krebiehl, 2018).
Consumers	People living in Canada, age 19 or older, who consume wine at least once per month, and who purchase wine on premise or off premise.
Consumption groups	Vegan, vegetarian, omnivore reducing, omnivore.
Omnivore	People who consume animal products.
Omnivore reducing (OR)	People who intend to reduce animal product consumption: including pescatarian (may consume fish, eggs and/or dairy but no other animal product) and pollo-pescatarian (may consume chicken, fish, eggs and/or dairy but no other animal product.)
Other provinces	New Brunswick, Newfoundland and Labrador, Northwest Territories, Nova Scotia, Nunavut, Prince Edward Island, Yukon.
Pescatarian	People who may consume fish, eggs and/or dairy but no other animal product
Pollo-pescatarian	People who may consume chicken, fish, eggs and/or dairy but no other animal product.
Vegan	People who do not consume any animal products at all.
Vegetarian	People who may consume eggs and/or dairy, but no other animal products.
West	Alberta, British Columbia, Manitoba, Saskatchewan.

4.2 Methodology Phase 1[2]

In January 2020, 15 wine consumers, representing each of the consumption groups and five provinces, were asked 25 questions relating to their awareness and interest in VVW. Their responses were collected via email and phone and analyzed with an Excel spreadsheet. Follow-up with some subjects was required to clarify responses. The demographics of Phase 1 subjects are outlined in Table 2.

Table 2: Phase 1 subject demographics

Participant	Province	Consumption	Age
1	Nova Scotia	Omnivore	60+
2	British Columbia	Vegetarian	30–39
3	Quebec	Reducing	60+
4	British Columbia	Omnivore	60+
5	Ontario	Vegetarian	30–39
6	Ontario	Omnivore	30–39
7	Ontario	Omnivore	40–49
8	Ontario	Omnivore	60+
9	Ontario	Omnivore	30–39
10	Ontario	Vegetarian	40–49
11	British Columbia	Reducing	30–39
12	British Columbia	Vegan	30–39
13	Alberta	Omnivore	40–49
14	Alberta	Omnivore	30–39
15	Alberta	Omnivore	50–59

[2] The survey is located in the appendix.

4.3 Methodology Phase 2[3]

In January 2020, 20 trade members were asked 28 questions to determine their perception of consumer interest in VVW in Canada. The respondents were selected to represent a broad range of the trade operating across Canada[4]. Their responses were collected via email and analyzed with an Excel spreadsheet. A list of the Phase 3 subjects can be found in Table 3.

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[3] The survey is located in the appendix.

[4] [redacted]

Table 3: Phase 2 subjects

Participant # & Name		Location	Occupation	Company
1	Sherry Karlo	Ontario	Vintner/President	Karlo Estate Winery
2	Magdalena Kaiser	Ontario	Director Public Relations	WMAO[5]
3	Elsa Macdonald MW	Ontario	Director Wine Education	Arterra
4	Alex Good	Alberta	Owner	Spur Imports
5	Ernest Sargent	British Columbia	Product Consultant	BCLDB
6	[redacted]	[redacted]	[redacted]	[redacted]
7	[redacted]	[redacted]	[redacted]	[redacted]
8	Katy Moore	Ontario	Owner	Katy Moore Wines
9	Ascheri Matteo	Italy	Owner	Azienda Agricola Ascheri Matteo
10	Nora Thiel	South Africa	Director	Delheim
11	Barbara Philip MW	British Columbia	Category Manager	BCLDB
12	Eugene Mlyncyk MW	Ontario	Sales Manager	Arterra
13	Kler-Yann Bouteiller	Quebec	Wine Educator	Self-employed
14	Della Brown	British Columbia	Server	Fairmont Hotels
15	Ann Sperling	Ontario	Winemaker	Southbrook Winery
16	Mark Dewolf	Nova Scotia	National President	CAPS[6]
17	Dawn Schultz	British Columbia	Sommelier	Vij's restaurant
18	Spencer Smith	Ontario	Assistant Retail Manager	Andrew Peller Limited
19	[redacted]	[redacted]	[redacted]	[redacted]
20	[redacted]	[redacted]	[redacted]	[redacted]

[5] Wine Marketing Association of Ontario

[6] Canadian Association of Professional Sommeliers

4.4 Methodology Phase 3[7]

In January 2020, 1000 wine consumers completed a 31-question online survey[8]. Wine Intelligence[9] was hired to advise on survey question optimization, deploy the survey and provide the survey results based on an analysis plan designed by the researcher. The survey results were delivered in the form of descriptive statistics, frequencies and cross-tabs via Excel spreadsheet. The online survey was offered to consumers in both English and French. As in Mlynczyk (2015), the survey comprised of multiple-choice and Likert-scale questions and was designed to provide quantitative answers to the established research questions.

The survey was piloted with 12 volunteers to confirm clarity and length. Their responses did not contribute to the final results of the research.

The survey responses were post-weighted to reflect the demographics of the Canadian wine drinker – as previously established by Wine Intelligence (2018) – for gender, age and province of residence. If respondents provided inconsistent answers or sped through the survey, their responses were removed from the results.

The subjects were asked to indicate their consumption preference from the following options: vegan, vegetarian, omnivore reducing (OR), pescatarian, pollo-pescatarians or omnivore. Pescatarians and pollo-pescatarians were grouped with OR for this study. The subjects were not pre-selected to represent the defined consumption groups, as the research at hand is the first to establish these percentages.

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[7] The survey is located in the appendix.

[8] The survey questions for the research at hand were deployed as part of a larger unrelated survey being conducted by Wine Intelligence.

[9] Established in 2002, Wine Intelligence is considered the ‘world’s leading research-led insights, branding and marketing strategy consultancy for the wine sector’ (Wine Intelligence, 2020A).

4.5 Methodological limitations

Of the 1000 subjects surveyed in Phase 3, 821 indicated their consumption group. The 179 subjects who did not indicate their consumption group were removed from the survey due to the concern that they would be less likely to thoroughly answer additional survey questions relating to their consumption preferences. As the demographics (for gender, age and province) of the 821 remaining subjects reflect those of Canadian consumers (Wine Intelligence, 2020B), it is assumed that their responses represent those of Canadian wine consumers with a +/- 3.42% margin of error at the 95% confidence interval (Smart Survey, 2020) (Table 4).

In the analysis, where the share of the subgroup providing a particular response is highlighted as higher or lower than the share of the base group of consumers providing that response, the responses are significantly different at the 95% confidence level. Significance was established by using the Harris Research Partner's online calculator (Harris Research Partners, n.d.). Findings should be considered directional for subgroups with fewer than 50 subjects.

An examination of sales channels, consumption occasions and willingness to pay is outside of the scope of this study and provide an opportunity for future research.

Table 4: Demographics of Phase 3 subjects[10]

Demographics of Phase 3 subjects	Share of Canadian consumers established by Wine Intelligence (2020B) n=1002	Share of subjects in this research n=821
Male n=421	50%	51%
Female n=400	50%	49%
Age 19–34 n=246	29%	30%
Age 34–54 n=272	35%	33%
Age 55+ n=303	36%	37%
Quebec n=196	25%	24%
Ontario n=322	39%	39%
West n=259	30%	32%
Other provinces n=43	5%	5%
Under $60,000 n=300	Not established	37%
$60,000–$90,999 n=245	Not established	30%
$100,000+ n=214	Not established	26%
Prefer not to provide income n=61	Not established	7%
Vegan n=14	Not established	2%
Vegetarian n=24	Not established	3%
Omnivore reducing n=202	Not established	25%
Omnivore n=579	Not established	71%

[10] Percentages may not add up to 100% due to rounding.

5. Results and analysis

5.1 Results and analysis Phase 1

5.1A Phase 1 overview

In Phase 1, 15 consumers representing each of the consumption groups and five provinces were asked 25 questions relating to their attitudes toward VVW. The insight gained in Phase 1 shaped the Phase 3 survey.

5.1B Consumer knowledge and awareness

The survey establishes that consumers fail to identify many common winemaking substances. Fewer than 20% of consumers are aware that ‘eggs, milk, fish and bone’ are used and fewer than 25% can distinguish between VGW and VW.

The survey reveals that 33% of consumers are aware of VGW and 20% of VW. While these levels of awareness are higher than those established by Wine Intelligence (2019)[11], both studies identify a greater awareness of VGW over VW.

As identified in the literature review, consumers are demanding more information about how the products they consume are made (Dimara & Skuras, 2005; Label Insight, 2016; Nielsen/ Harris poll cited in Thach, 2020). Similarly, 53% of Phase 1 consumers express an interest in learning more about VVW, 80% want to see all winemaking products listed on the label and 73% want to see animal products used on the label, even if they are filtered out.

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[11] As cited in the literature review, Wine Intelligence (2019), found that 9% of consumers are aware of VGW and 6% are aware of VW.

5.1C Current market

While 20% of consumers purchased VGW, 60% of those aware of the category purchased it. Similarly, 13% of consumers purchased VW and 67% of those aware of the category purchased it. This suggests that the niche size of the VVW category could be a result of low awareness, and that category growth could result from increased exposure. Compared to the Wine Intelligence (2019) findings established in the literature review, these results indicate much higher shares. The qualitative survey in Phase 3 will confirm whether these higher shares reflect a trend.

5.1D Market potential

Two thirds (67%) of consumers think VGW is 'a fit for themselves'[12] most of the time or occasionally, and 60% agree for VW. These are significantly higher shares compared to the Wine Intelligence (2019) results established in the literature review. The qualitative survey in Phase 3 will also confirm if these higher shares reflect a trend.

If quality, price and taste are the same, 80% of consumers indicate that they are extremely likely, very likely or somewhat likely (*likely*) to purchase VGW, and 60% VW. In contrast, 75% of consumers state that learning 'eggs, milk, fish and bone' are used in winemaking is unlikely to change their future wine purchases. This suggests that without alternatives, most consumers are apt to continue purchasing non-VVW wine; however, given the option, their purchases may be swayed to a VVW alternative.

[12] 'Fit for themselves', was changed to 'right for themselves' for the Phase 3 survey.

5.1E Consumer perceptions

Ten or more consumers (67%+) associate the descriptors ‘delicious’, ‘social’, ‘special occasion’, ‘affordable’ and ‘food-friendly’ with wine, and ‘healthy’ and ‘natural’ with vegan and vegetarian products. The Phase 3 survey was adjusted to capture these perspectives[13]. The backlash toward vegan products (Crosariol, 2018; Dhont & Stoeber, 2020; Markowski & Roxburgh, 2019; Potts & Perry, 2010), identified in the literature review was not evident in these responses and will be tested further in Phase 3.

A vegan or vegetarian-certified label is preferred by 50% and 33% of those *likely* to purchase vegan and vegetarian wine respectively. As previously established, third-party certification can provide assurance for consumers (Cazrnezki, et al., 2014), however, definitions for ‘vegan’ and ‘vegetarian’ will need to be established for certification to be viewed as credible.

The top purchase motivations among those who indicate that they are *likely* to purchase VVW are ‘concern for animals’ and ‘concern for the environment’ (Table 5). These perspectives align with the growing interest in environmental and ethical consumerism (Mileham, 2019; Wine Intelligence, 2020B) identified in the literature review. ‘For friends and family’ and ‘curiosity’ are subject responses not initially included in the questionnaire; however, they were added to the Phase 3 survey. Consumers also agree with a range of barrier statements (Table 6). Due to the small sample size for this question, all barrier statements, including those not selected by the Phase 1 consumers, were tested in Phase 3.

[13] No changes in the Phase 3 survey were made with respect to the descriptor ‘special occasion’ as consumption occasion is outside of the scope of this research.

Table 5: Reasons to purchase vegan or vegetarian wine

Reason	Share who agree for vegan wine	Share who agree for vegetarian wine
Concern for animal welfare	46%	67%
Concern for the environment	46%	67%
Concern for allergies	8%	11%
Concern for health other than allergies	31%	22%
The use of animal products in wine is unnecessary	38%	33%
The use of animal products in wine is unappealing	15%	11%
For friends and family	15%	NA
Curiosity	8%	44%

Table 6: Barriers to purchase vegan or vegetarian wine

Barrier	Share who agree for vegan wine	Share who agree for vegetarian wine
Vegan/vegetarian wine is not available where I shop	20%	NA
The use of animal products in wine is not important to me	20%	33%
The use of animal products in wine is less important to me than other attributes of the wine	NA	17%
VVW is more expensive than non-VVW	NA	NA
VVW is of lower quality than non-VVW	20%	17%
Labelling wine as VVW is a marketing ploy	20%	17%

When asked to choose between attributes, consumers most often select grape variety (23% of the time) closely followed by region (22% of the time) and brand (21% of the time). Comparatively, consumers select vegan (5% of the time) and vegetarian winemaking (5% of the time) much less frequently. Similarly, Berghoef and Dodds (2011) found that wine consumers in Ontario prioritize grape variety and brand over winemaking. The importance consumers place on vegan and vegetarian winemaking relative to other choice attributes is low.

5.1F Phase 1 summary

The survey indicates that consumers have a relatively low awareness of the use of many winemaking substances, including animal products. This simplified view of winemaking probably contributes to the relatively low awareness of VVW: most consumers aren't thinking about animal-free wine alternatives, because they aren't aware that animal products are used in winemaking.

Aligned with research that establishes a call for increased label transparency (Dimara & Skuras, 2005; Label Insight, 2016; Nielsen/ Harris poll cited in Thach, 2020), the majority of consumers want to see all winemaking products, including animal products that have been filtered out, listed on the label. Consumers also prefer the label to show certification.

The results show that a limited share of consumers purchased VVW in the past six months; however, a higher share of those aware of the category purchased it. This suggests that consumer education could result in category growth.

The research indicates that consumers consider vegan or vegetarian winemaking to be much less important than other choice attributes; however, the majority consider VVW a fit for themselves and express an interest in learning more about the category. While the majority of consumers indicate that becoming aware of the use of animal products in wine will not affect their future purchases, they also indicate that they would be *likely* to purchase VVW if the price, quality and taste were equal. These results suggest that while most consumers are not seeking out VVW, they may pivot their purchase to an animal-free alternative if it is an option.

The survey establishes that the top purchase motivations for VVW are concerns for animals and the environment. These considerations align with the larger global trends of ethical consumerism (Mileham, 2019; Wine Intelligence, 2020B) which could provide momentum for the VVW category. The results of Phase 1 were used to develop the Phase 3 survey which will quantitatively establish Canadian consumers' attitudes toward VVW.

5.2 Results and analysis Phase 2

5.2A Phase 2 overview

In January 2020, 20 trade members were asked 28 questions to determine their perception of consumer interest in VVW in Canada. The insight gained in Phase 2 was used to shape the questions in Phase 3.

5.2B Consumer knowledge and awareness

Mirroring the Phase 1 results, the majority (75%) of the trade believe that consumers are largely unaware of the use of animal products in winemaking. The trade's perception of the industry's understanding of the use of animal products in winemaking is divided. It is likely, due to its small size, that the VVW category is rarely discussed among the trade and the knowledge levels of the industry are less established.

5.2C Current market

The majority of the trade consider vegan winemaking (85%) and vegetarian winemaking (80%) to be somewhat important to consumers or important to a small segment. Three of the twenty respondents provided additional comments that VW was not a significant category. A picture of the current market can also be developed by considering the number of enquiries the trade has received for VVW. Most of the trade report no enquiries, or a limited number of enquiries, with more for VGW. Overall, the trade considers the VVW market to be limited and to favour VGW over VW.

Likely due to its limited size, the trade was unable to provide a unified picture of consumer demand for VVW on premise and off premise or how interest in VVW varies by province. While attitudes toward VVW by province will be examined in this research, consumption occasion is outside of the current scope.

5.2D Market potential

The majority of the trade believes interest in VGW (75%) and VW (60%) will increase slightly in the future. Aligned with the Phase 1 analysis, over half of the trade (58%) expect some consumers to choose animal-free alternatives upon learning that animal products are used in wine. Fewer trade members (42%) expect this conversion to take place if consumers know that any animal products used to make the wine have been filtered out of the wine and none believe that consumers will purchase less when they learn that animal products are used in wine.

Congruent with their evaluation that the current market favours VGW, more of the trade expects a conversion to VGW (67%) compared to VW (58%). This finding is consistent with Phase 1 results where a higher share of consumers indicate they were *likely* to purchase VGW compared to VW.

While the majority of the trade think that increased awareness of VVW will create an opportunity within a limited segment of the market, they also predict that increased availability of VVW is not likely to impact the size of the wine category.

5.2E Consumer perceptions

Aligned with the previously established global theme of environmental and ethical consumerism (Mileham, 2019; Wine Intelligence, 2020B), the majority of the trade (81–94%) believe that a ‘concern for animal welfare’ and a ‘concern for the environment’ are the top motivators for purchasing VVW. The trade also cites several other motivations for VVW purchases (Figures 1 and 2). Their importance to consumers is examined in Phase 3.

Figure 1: Motivations to purchase vegan wine

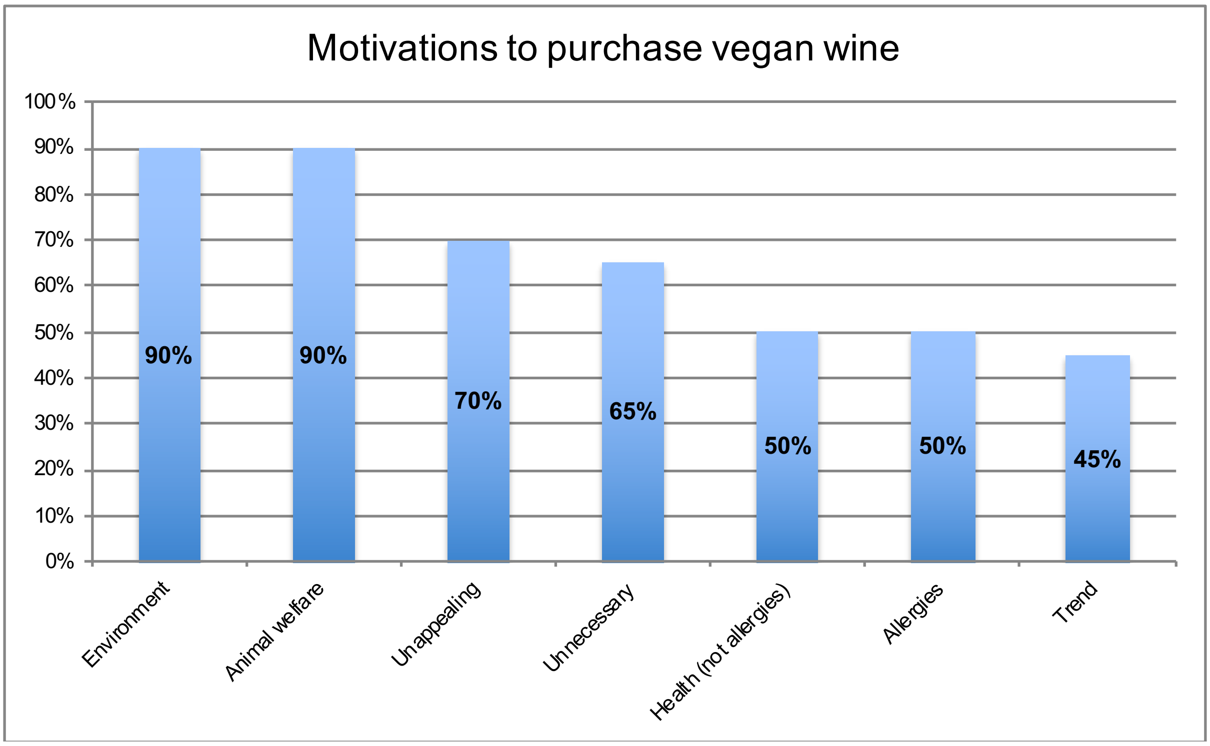
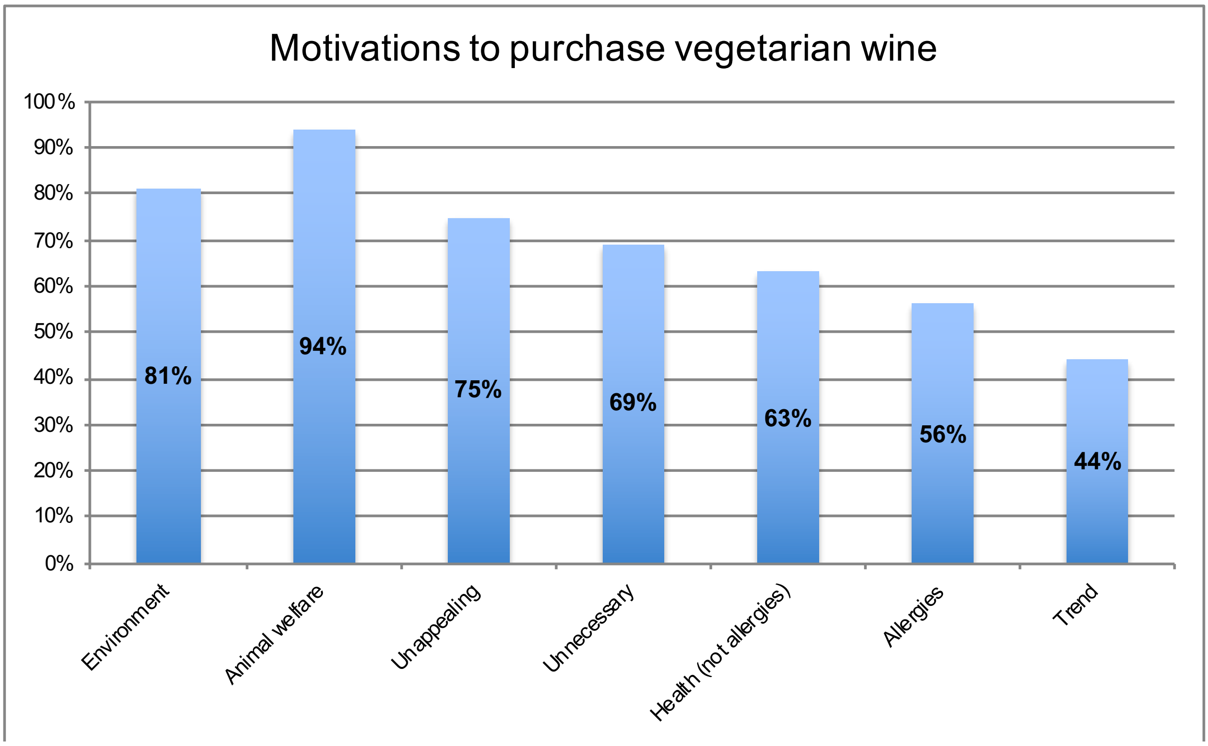


Figure 2: Motivations to purchase vegetarian wine



5.2F Consumer profile

Several trade members describe the VGW (63%) and VW (12%) consumer as 'younger' (Figures 3 and 4). Some of the trade believe consumption preferences play a role in interest in VVW, describing the VGW consumer as vegan (18%) and the VW consumer as vegetarian (12%). The Phase 3 survey will verify the trade's perspective and confirm whether interest in VVW expands beyond these consumer groups.

Figure 3: Consumer demographic vegan wine

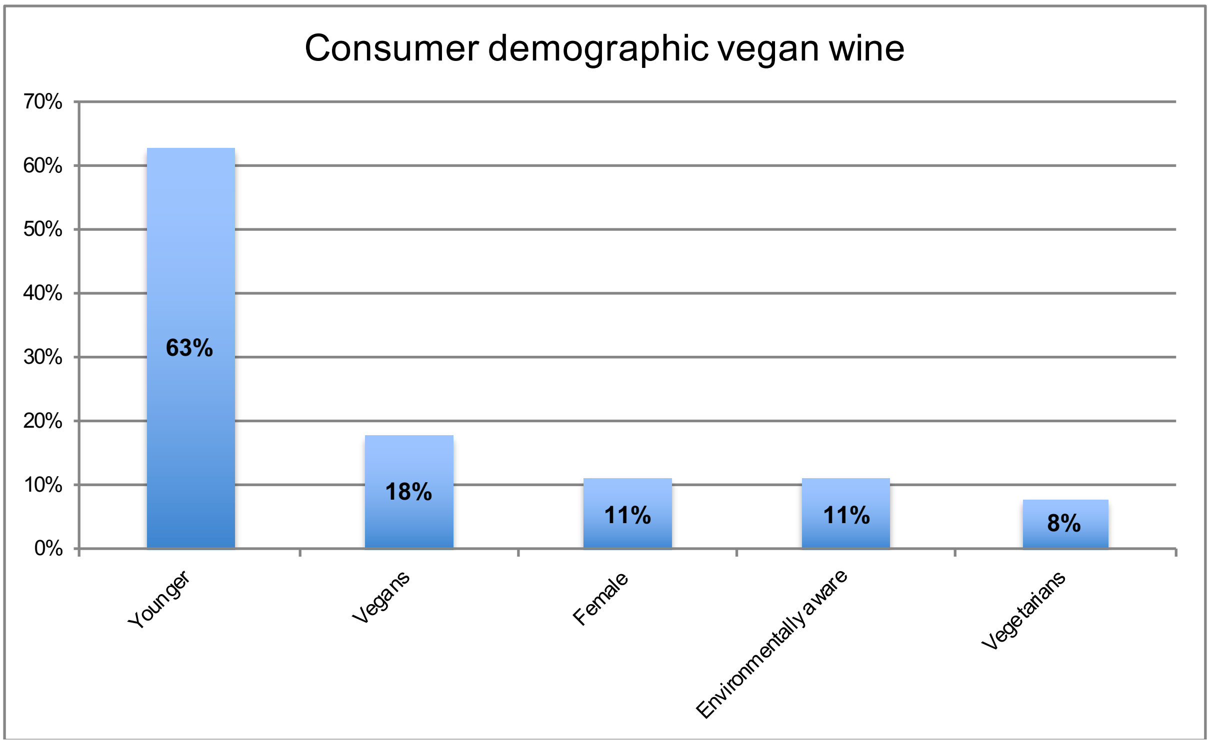
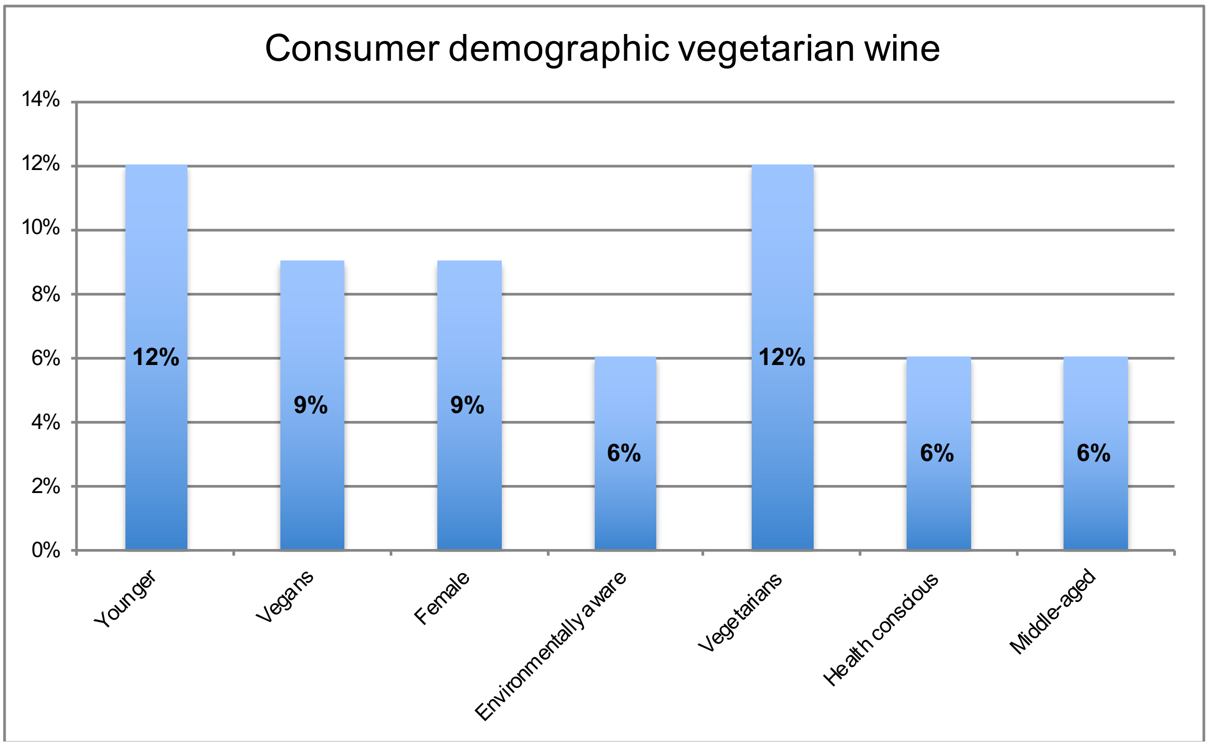


Figure 4: Consumer demographic vegetarian wine



5.2G Trade approach to VVW

Aligned with their belief that consumers are more interested in VGW than VW, a larger share of the companies represented market VGW (37%) versus VW (11%) in Canada. The results reveal that the trade currently sees the category as niche. The majority (61%) have not researched consumer attitudes toward VVW, fewer than 20% are planning to test-market VVW in Canada in the future and only 11% are interested in conducting future research. At the same time, the majority of the trade is interested in learning more about VVW.

Of the five companies represented in Phase 2 that sell wine internationally, two currently sell vegan wine outside of Canada, one sells vegetarian wine and one is interested in testing VVW sales internationally. The UK, the USA, Scandinavia, Germany, Australia, Ireland, New Zealand and the EU are all considered by the Phase 2 trade to be international markets were VVW is important. As identified in the literature review, Wine Intelligence research (2020B), also indicates the USA and Australia are among the markets with the most opportunity for VWW and VW respectively.

5.2H Phase 2 summary

The results indicate that the majority of the trade considers the VVW category niche, favouring VGW over VW. This perspective is supported by the number of enquiries the trade have received, and the number of represented companies currently marketing VVW in Canada.

The trade perceives consumers to be largely uninformed about the use of animal products in winemaking. While the trade predicts that increased awareness of VVW will result in some consumers buying animal-free alternatives, resulting in a slight increase in the VVW category, they do not anticipate any impact on the overall size of the wine category. The trade expects the opportunity for VGW to continue to be slightly higher than that for VW and most often describes the VVW demographic as younger, vegan or vegetarian and concerned about animals and the environment. The trade perspective of consumers' attitudes toward VVW will be verified by the qualitative Phase 3 survey.

5.3 Results and analysis Phase 3

5.3A Phase 3 methodology review

In January 2020, 1000 consumers completed a 31-question online survey. Of those surveyed, 821 indicated their consumption group and were included in the analysis. The survey establishes that 3% of Canadian wine consumers identify as vegan or vegetarian; a smaller share than the 9.4% of Canadians that identify as vegan or vegetarian (Charlebois cited in Flanagan, 2018).

5.3B Consumer knowledge and awareness

The survey reveals that the majority of consumers recognize the use of grapes (85%), water (59%) and sugar (57%) in winemaking; however, fewer than half recognize the use of any other substances including the animal-derived substances: gelatin (7%), shell (7%), eggs (6%), fish (6%) and milk (5%). As in Phase 1, the results show that consumers have a simplified understanding of winemaking. This finding aligns with a trend toward reduced wine knowledge and 'cognitive offloading' to the internet for information (Wine Intelligence, 2020B).

Aligned with their consumption preferences, vegans and vegetarians have a lower awareness of the main winemaking ingredients, but a heightened awareness of the use of some animal substances.

Fewer consumers age 19–34 (U34) (76%) and more age 55 and older (55+) (94%) are aware of the use of grapes in wine, while U34 are more aware of the use of fish (10%). These age-related differences may be due to the older cohort having more category experience. Additionally, U34 more often incorrectly identify flour (9%), suggesting that they are less knowledgeable about winemaking overall.

The survey indicates that consumers' awareness of VGW (13%) is significantly higher than awareness of VW (6%). While the awareness established for VW is consistent with Wine Intelligence (2019), the survey indicates a higher awareness of VGW, suggesting awareness of this alternative is increasing.

Variances in awareness levels among subgroups could reflect interest levels in VVW, or they could represent an opportunity for category growth. More U34 (11%) and Ontarians (10%) and fewer 55+ (3%) and Quebecers (1%) are aware of VW. More vegans (40%) and fewer 55+ (5%) and Quebecers (6%) are aware of VGW. This is consistent with Wine Intelligence (2019) who also found U34 to be more aware of VGW (10%) and VW (14%), and 55+ less aware of VGW (2%) and VW (4%).

The majority of vegans, vegetarians and OR are unaware of the wines that align with their consumption preferences. In addition to 40% of vegans being aware of VGW, only 25% of vegetarians and 14% of OR are aware of the category. Only 13% of vegetarians and 8% of OR are aware of VW. This research examines consumer attitudes to determine how increased awareness among various subgroups is likely to impact the VVW category.

5.3C Current Market

According to the survey, the share of consumers purchasing VVW in the past six months is limited. While 2% purchased VGW and 1% purchased VW the difference between the two categories is not significant (Table 7). These results are similar to previous Wine Intelligence (2019) research which established 1% of consumers purchased both vegan and vegetarian wine in the previous six months. Aligned with respective awareness levels, a higher share of U34 (5%) and a lower share of 55+ purchased VVW (0%). Quebecers purchased less VGW (0%). This is consistent with Wine Intelligence (2019) who also found a higher share of U34 purchased VGW (2%) and VW (3%) and no 55+ purchased in the previous six months.

Table 7: Share of consumers who purchased vegan or vegetarian wine[14]

	Purchased vegan wine	Purchased vegetarian wine
All consumers n=821	2%	1%
Vegetarian n=24	16%	10%
Vegan n=14	32%	0%
Omnivore reducing n=202	3%	3%
Omnivore n=579	1%	0%
Male n= 421	2%	2%
Female n=400	3%	1%
Age 19–34 n=246	5%	4%
Age 35–54 n=272	3%	0%
Age 55+ n=303	0%	0%
Under $60,000 n=300	2%	1%
$60,00–$99,999 n=245	3%	3%
$100,000+ n=214	2%	0%
Quebec n=196	0%	0%
Ontario n=322	4%	2%
West n=259	2%	1%
Other provinces n=43	0%	3%

Several purchasing patterns align with consumption preferences:

- more vegetarians had purchased both VGW (16%) and VW (10%)
- more vegans (32%) purchased VGW
- fewer vegans (none) purchased VW
- fewer omnivores (1%) purchased VGW.

The majority of vegans are not purchasing VGW and the majority of vegetarians are not purchasing VVW. An examination of purchasing share among those aware of

[14] Data highlighted in red/blue are significantly higher/lower than the total consumer group.

VVW suggests that a lack of awareness is a contributing factor. A higher share of aware consumers purchased VGW (18%) and VW (22%), compared to the share of all consumers who purchased. Among consumers who are aware, more vegetarians (65%) and vegans (80%) and fewer omnivores (5%) purchased VGW and more vegetarians purchased VW (72%). These findings suggest the potential for category growth with increased consumer education. It is also important to understand why the majority of the aware consumers did not purchase VVW in the past six months. Attitudes toward VVW as well as purchase drivers and barriers will be examined in upcoming questions.

5.3D Market potential

Consumers were asked how likely they would be to purchase vegan/vegetarian wine versus a non-vegan/vegetarian wine if quality, price and taste were the same (Figures 5 & 6). More consumers indicate that they are *likely* to purchase VVW compared to the share who had indicated that they had recently purchased suggesting an opportunity for category growth. The results also show that more consumers indicate that they are *likely* to purchase VW compared to VGW.

Figure 5: Share who are likely to buy vegan wine

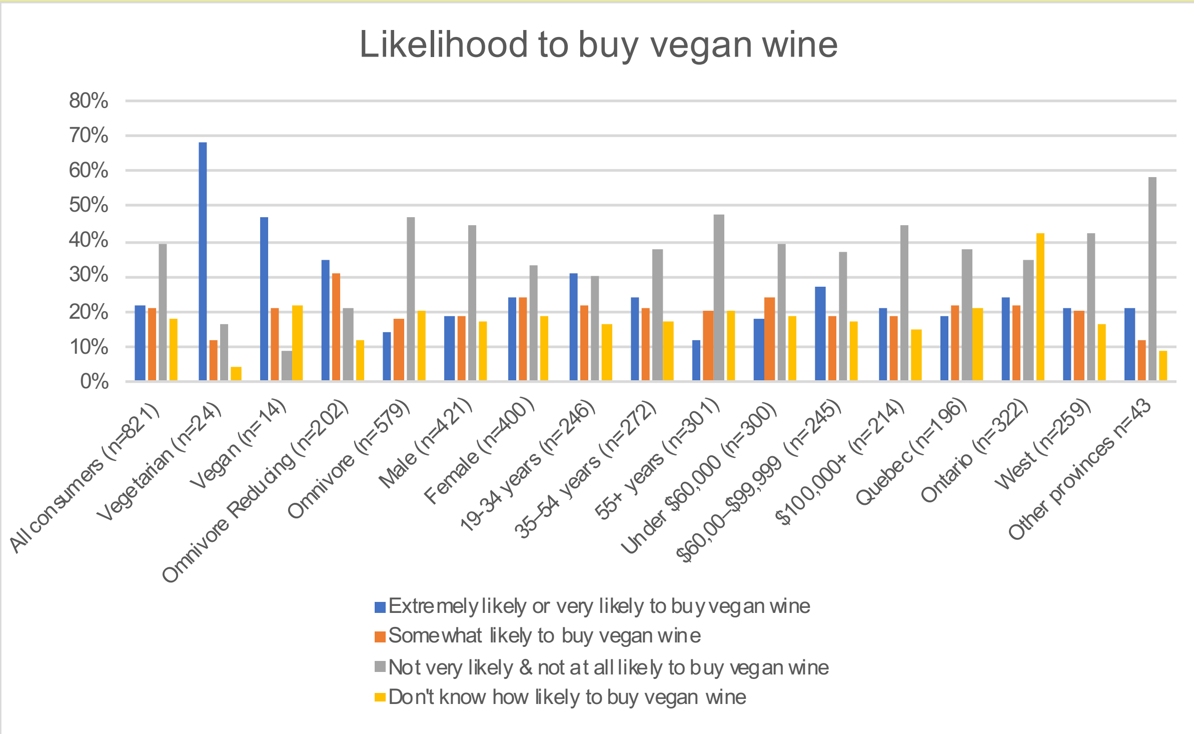
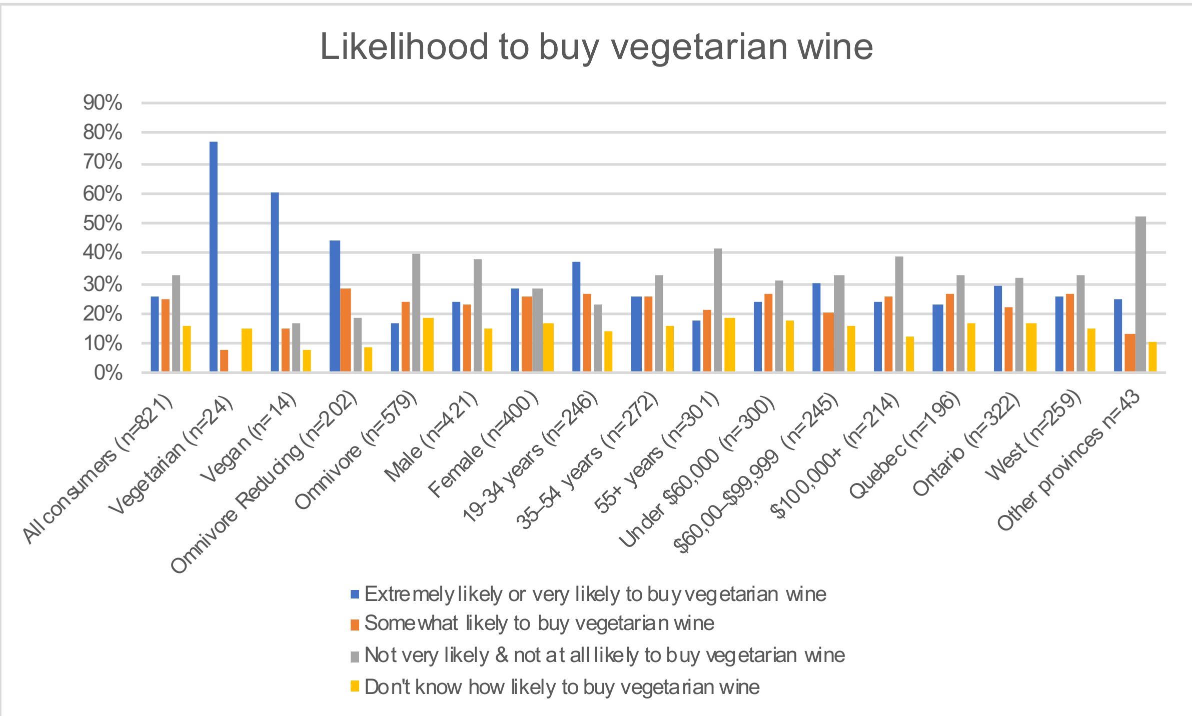


Figure 6: Share who are likely to buy vegetarian wine



While 2% of consumers have purchased VGW in the past six months, 43% indicate that they are *likely* to purchase VGW if quality, price and taste were the same. Concerning VW, 1% of consumers had purchased in the past six months however, 51% indicate that they are *likely* to purchase. The delta between purchasing history and purchasing intention is likely to be due, in part, to a lack of awareness. While the consumers' intent to purchase suggests an opportunity for the VVW category beyond its current size, 39% and 33% said they are not very likely or not at all likely to buy VGW and VW respectively. Of further consideration is a potential discrepancy between purchase intention and purchase behavior (Carrington, Neville, & Whitwell, 2012; Rimal, Fletcher, & McWatters, 1999). Therefore, it is expected that not all of the consumers who indicate they are *likely* to purchase VVW will purchase.

Aligned with their consumption preferences, a higher share of vegetarians (80%), vegans (69%) and OR (67%), and fewer omnivores (32%), are *likely* to purchase VGW. Similarly, more vegetarians (85%), vegans (75%) and OR (72%), and fewer omnivores (41%), are *likely* to purchase VW. This result also illustrates the appeal for VVW beyond vegans and vegetarians, to OR and omnivores.

Echoing the current trends, more U34 (53%) and fewer 55+ (32%) indicate that they are *likely* to purchase VGW. Similarly, more U34 (63%) and fewer 55+ (39%) indicate that they are *likely* to purchase VW. This is consistent with Wine Intelligence (2019) who also found a higher share of U34 indicated their intent to purchase VGW (29%) and VW (29%) and fewer 55+ indicate their intent to purchase VGW (11%) or VW (12%).

Significant differences in intent to purchase were also found for location and gender. More consumers from the 'other provinces' are not likely or not at all likely to buy VGW (58%) or VW (52%), demonstrating a lower affinity for VVW, while a lower share of females is not likely or not at all likely to buy VGW (33%), indicating a higher affinity for this category. This research further investigates attitudes toward VVW by asking the extent to which subjects consider VVW ‘right for people like me’.

Compared to the share of consumers who have purchased VVW in the past six months, a significantly larger share agree or strongly agree with the statement ‘vegan/vegetarian wine is right for people like me’. Concerning VGW, 20% of consumers agree with the statement, and 21% of consumers agree with the statement for VW (Figures 7 & 8).

Consistent with their indication of intent to purchase, a higher percentage of vegetarians (68%), vegans (84%), OR (30%) and U34 (31%), and fewer omnivores (13%) and 55+ (9%) agree or strongly agree that ‘VGW is right for people like me’. A higher percentage of vegetarians (71%), vegans (77%), OR (35%) and U34 (34%), and fewer omnivores (13%) and 55+ (9%), also agree or strongly agree that ‘VW is right for people like me’. More consumers from ‘other provinces’ disagree or strongly disagree (53%) with ‘VGW is right for people like me’.

Figure 7: Vegan wine is 'right for me'

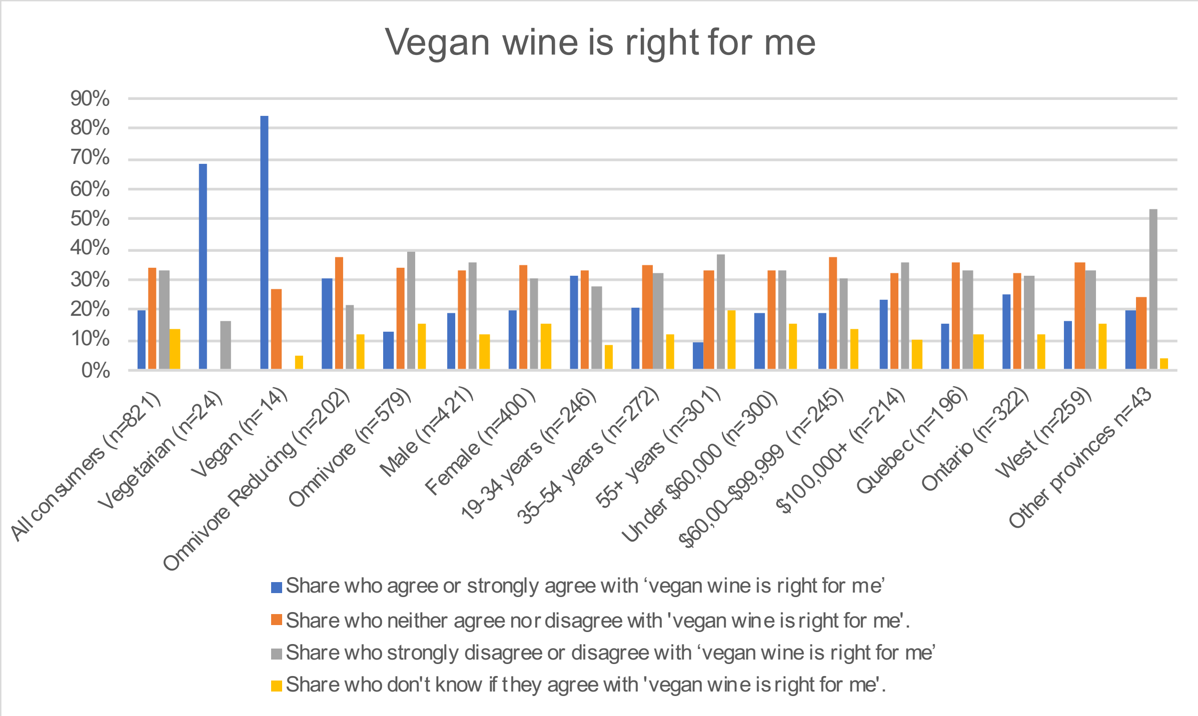
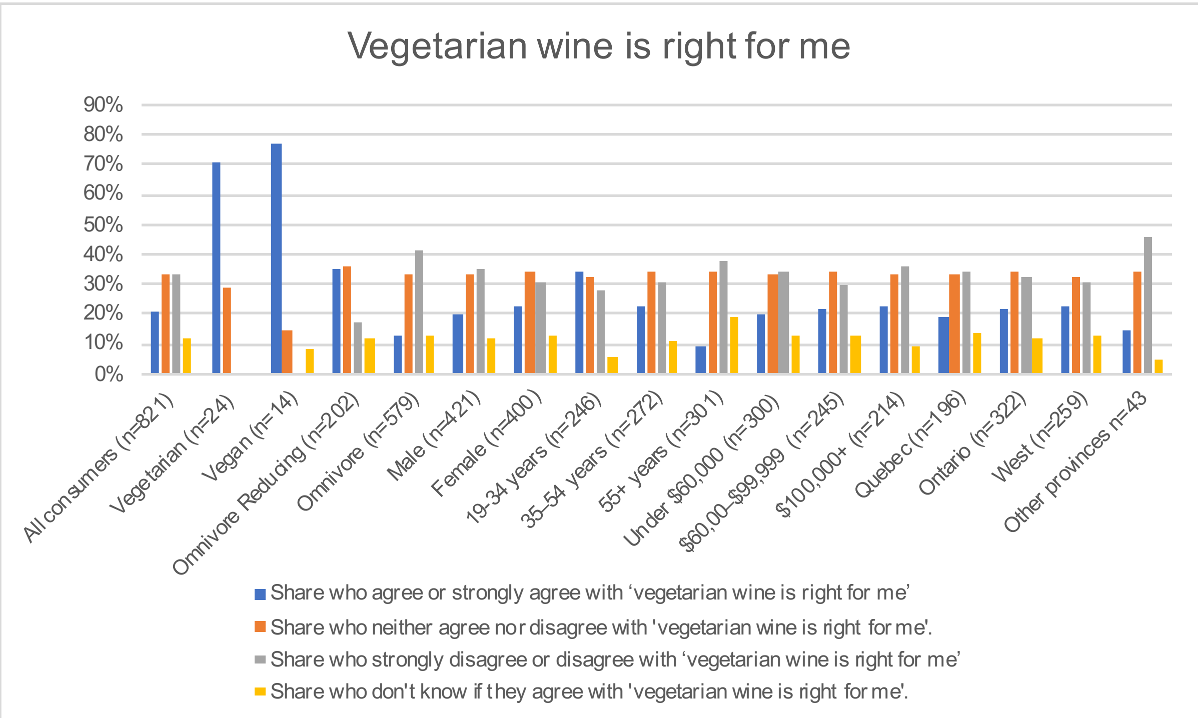


Figure 8: Vegetarian wine is 'right for me'



This research defines attitudes toward VVW as the consumer's intent to purchase and the extent to which they agree that a product is 'right for people like me'. Considering the share of consumers who indicate that they are extremely likely or very likely to purchase VGW (22%) and VW (26%), and the share that agree and strongly agree that VGW (20%) and VW (21%) is 'right for people like me', it can be concluded that 21% of consumers have a positive attitude toward VGW and 24% have a positive attitude toward VW[15]. While slightly more consumers have a positive attitude toward VW compared to VGW, the difference is not significant.

A larger share of the population holds a negative attitude toward VVW. Concerning VVW, 33% disagree or strongly disagree that it is 'right for people like them' and 39% and 33% are not likely or not at all likely to purchase VGW and VW respectively. Therefore, 36% of consumers can be considered to have a negative attitude toward VGW and 33% of consumers have a negative attitude toward VW[16]. It can also be concluded that 43% of consumers have a neutral attitude toward both vegan and vegetarian wine.

The results illustrate that more vegetarians, vegans, OR and U34 have a positive attitude toward VVW. More omnivores have a more negative attitude toward VVW and more consumers from the 'other provinces' have a negative attitude toward VGW.

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[15] The share of consumers who have a positive attitude was determined by the average of the share of consumers that indicate they are extremely likely to purchase VGW or VW and the share of consumers that agree or strongly agree with the statement VGW or VW is 'right for people like me'.

[16] The share of consumers who have a negative attitude was determined by the average of the share of consumers who are not very likely or not at all likely to purchase VGW or VW and the share of consumers who disagree or strongly disagree with the statement VGW or VW is 'right for people like me'.

5.3E Consumer perceptions

Consumers who indicate that they are *likely* to purchase VVW were asked to evaluate the importance of the motivations established in Phase 1 using the following scale: 1 = ‘Not at all important’ 2 = ‘Not important’ 3 = ‘Neither important nor unimportant’ 4 = ‘Important’ and 5 = ‘Very important’. Consumers’ mean importance ratings for motivations to purchase VVW are outlined in Tables 8 and 9.

Several motivations to purchase are considered equally important: ‘concern for the environment’, ‘concern for animal welfare’, ‘belief that the use of animal products in wine is unnecessary’ and ‘preference of the people drinking the wine’.

The first three of these motivations align with the growing interest in ethical consumerism (Mileham, 2019; Wine Intelligence, 2020B) which may provide momentum to awareness and growth of the VVW category.

Consumers’ motivation to purchase wine that suits the ‘preference of the people drinking the wine’ expands the VVW category beyond those who consider VVW right for themselves. This finding aligns with input received from one subject in Phase 2: some consumers will select a VGW if they are unsure of the recipient’s preferences, as long as their quality expectations are met.

The belief that ‘the use of animal products in wine is unappealing’ and ‘curiosity to try VGW’ are equally important to consumers for VGW. The view that the use of animal products in wine is unappealing suggests an openness to the vegan category. Curiosity may draw consumers into the category; however, their expectations for quality must be met to motivate repeat purchases (Charters & Pettigrew, 2003).

‘Curiosity to try vegan wine’ is also the top motivation for vegans to purchase VGW, while vegans and vegetarians both rank ‘the belief that the use of animal products in wine is unnecessary' as their top motivation for buying VW. This perspective may also be related to the previously established trend of ethical consumerism (Mileham, 2019; Wine Intelligence, 2020B).

'Concern for health other than allergies' and 'concern for allergies' are rated significantly lower than the other motivations; however, they remain important to a share of consumers. As identified in the literature review, animal-based fining agents, which are also allergens (eggs, milk and fish) are required to be identified on wine labels if they are present in wine at 10ppm or more (Government of Canada, 2020).

Table 8: Mean importance for motivations to purchase

Motivation to purchase	Mean importance for motivation to purchase vegan wine	Mean importance for motivation to purchase vegetarian wine
Concern for animal welfare	4.0	4.0
Concern for the environment	4.0	4.0
The use of animal products in wine is unnecessary	3.9	3.8
Curiosity to try VVW	3.9	3.7
The preference of the people who will be drinking the wine	3.8	3.8
The use of animal products in wine is unappealing	3.8	3.7
Concern for health other than allergies	3.6	3.5
Concern for allergies	3.5	3.3

Table 9: Top motivations to purchase vegan/vegetarian wine

Subjects likely to buy vegan wine	Top motivation to purchase vegan wine (mean importance)	Subjects likely to buy vegetarian wine	Top motivation to purchase vegetarian wine (mean importance)
Consumer *likely* to buy vegan wine n= 352	Concern for the environment/concern for animal welfare (4.0)	**Consumer *likely* to buy vegetarian wine n=415**	Concern for the environment/concern for animal welfare (4.0)
Vegetarian n=20	Belief that the use of animal products in wine is unnecessary (4.6)	**Vegetarian n=21**	Belief that the use of animal products in wine is unnecessary (4.4)
Vegan n=10	Curiosity to try vegan wine (4.6)	**Vegan n=11**	Belief that the use of animal products in wine is unnecessary (4.5)
Omnivore reducing n=135	Concern for the environment (4.3)	**Omnivore reducing n=145**	Concern for the environment/concern for animal welfare (4.3)
Omnivore n=188	Concern for animal welfare (3.9)	**Omnivore n=238**	Concern for the environment/concern for animal welfare (3.8)
Male n=160	Concern for the environment/ concern for animal welfare (3.9)	**Male n=197**	Concern for the environment (3.9)
Female n=192	Concern for animal welfare (4.2)	**Female n=218**	Concern for animal welfare (4.2)
Age 19–34 n=131	Concern for animal welfare (4.1)	**Age 19–34 n=156**	Concern for the environment (4.1)
Age 35–54 n=123	Concern for the environment (4.1)	**Age 35–54 n=141**	Concern for the environment/concern for animal welfare (4.1)
Age 55+ n=98	Concern for animal welfare (4.0)	**Age 55+ n=118**	Concern for the environment/concern for animal welfare (3.9)
Under $60,000 n=126	Concern for the environment/concern for animal welfare (4.0)	**Under $60,000 n=152**	Concern for the environment/concern for animal welfare (4.0)
$60,00–$99,999 n=112	Concern for the environment/concern for animal welfare (4.1)	**$60,00–$99,999 n=124**	Concern for the environment/concern for animal welfare (4.1)
$100,000+ n=85	Belief that the use of animal products in wine is unnecessary (4.0)	**$100,000+ n=106**	Concern for the environment/belief that the use of animal products in wine is unnecessary (3.9)
Quebec n=81	Concern for animal welfare (4.0)	**Quebec n=98**	Concern for animal welfare (3.9)
Ontario n=150	Concern for the environment/concern for animal welfare (4.1)	**Ontario n=165**	Concern for the environment (4.2)
West n=107	Concern for the environment/preference of the people who will be drinking the wine (4.0)	**West n=136**	Concern for the environment/concern for animal welfare (4.0)
Other provinces n=14	Belief that the use of animal products in wine is unnecessary (4.6)	**Other provinces n=16**	Concern for animal welfare (4.6)

Consumers were asked to use the following scale to rate potential purchase barriers: 1 = 'Strongly disagree' 2 = 'Disagree' 3 = 'Neither agree nor disagree' 4 = 'Agree' and 5 = 'Strongly agree'. The consumers' mean agreement to the purchase barriers is outlined in Tables 10 and 11[17].

Table 10: Consumers mean agreement to purchase barriers[18]

Purchase barrier	Mean agreement to purchase barrier for vegan wine	Mean agreement to purchase barrier for vegetarian wine
VVW is more expensive than non-VVW	3.6	3.5
Labelling wine as vegan/vegetarian is a marketing ploy	3.5	3.5
The use of animal products in wine is less important to me than other attributes of the wine	3.5	3.5
VVW is not available where I shop	3.4	3.3
The use of animal products in wine is not important to me	3.3	3.3
Products labelled as vegan/vegetarian are unappealing to me	3.3	3.2
I am hesitant to choose VVW because it limits my selection	3.3	3.2
VVW is of lower quality than non-VVW	3.1	3.1

[17] It is recognized that 'more expensive' is not always a barrier; however, willingness to pay is outside of the scope of this research.

[18] Means in blue are significantly different from the top-ranking barrier for each of vegan and vegetarian wine.

Table 11: Top purchase barriers to vegan and vegetarian wine

	Top purchase barrier to vegan wine (mean agreement)	Top purchase barrier to vegetarian wine (mean agreement)
All consumers n=821	VGW is more expensive than non-VGW (3.6).	VW is a marketing ploy/VW is more expensive than non-VW/ the use of animal products in wine is less important (3.5).
Vegetarian n=24	VGW is more expensive than non-VGW (3.5).	VW is not available where I shop (3.6).
Vegan n=14	The use of animal products in wine is less important (3.8).	VW is more expensive than non-VW (3.9).
Omnivore reducing n=202	VGW is more expensive than non-VGW/VGW is not available where I shop (3.5).	VW is more expensive than non-VW (3.6).
Omnivore n=579	VGW is more expensive than non-VGW (3.6).	VW is a marketing ploy/VW is more expensive than non-VW/ the use of animal products in wine is less important (3.5).
Male n=421	VGW is a marketing ploy/VGW is more expensive than non-VGW (3.6).	VW is more expensive than non-VW (3.6).
Female n=400	VGW is more expensive than non-VGW (3.5).	VW is more expensive than non-VW (3.5).
Age 19–34 n=246	VGW is more expensive than non-VGW (3.6).	Vegetarian wine is more expensive than non-VW (3.6).
Age 35–54 n=272	VGW is more expensive than non-VGW (3.6).	VW is a marketing ploy/VW is more expensive than non-VW/ the use of animal products in wine is less important (3.5).
Age 55+ n=303	VGW is a marketing ploy/VGW is more expensive than non-VGW (3.5).	VW is more expensive than non-VW (3.6).
Under $60,000 n=300	VGW is more expensive than non-VGW (3.6).	VW is more expensive than non-VW(3.6).
$60,000–$99,999 n=245	VGW is more expensive than non-VGW (3.7).	VW is more expensive than non-VW (3.6).
$100,000+ n=214	VGW is a marketing ploy/VGW is more expensive than non-VGW (3.5).	VW is a marketing ploy/VW is more expensive than non-VW (3.5).
Quebec n=196	VGW is a marketing ploy/VGW is more expensive than non-VGW (3.6).	VW is more expensive than non-VW (3.6).
Ontario n=322	VGW is more expensive than non-VGW/the use of animal products in wine is less important (3.6).	The use of animal products in wine is less important (3.6).
West n=259	VGW is more expensive than non-VGW (3.6).	VW is more expensive than non-VW (3.6).
Other provinces n=43	VGW is a marketing ploy/products labelled as vegan are unappealing to me/the use of animal products in wine is less important (3.5).	VW is more expensive than non-VW (3.6).

The survey reveals several top barriers to purchase VVW: ‘VVW is more expensive than non-VVW’, ‘labelling wine as vegan or vegetarian is a marketing ploy’, ‘the use of animal products in wine is less important to me than other attributes of the wine’ and ‘VVW is not available where I shop’. Consumers’ mean level of agreement to ‘the use of animal products in wine is not important to me’ is also not significantly different from the top four barriers for VW.

According to winemaker Ross Wise MW, plant-based fining alternatives are not more expensive than animal-based agents (Wise 2020, pers comm.). However, if wines take longer to produce because the winemaker has opted to allow the wine to settle instead of using fining agents (Krebiehl, 2018), they may be more expensive. The willingness to pay extra for VVW is outside of the scope of this research and provides an opportunity for future research.

‘Labelling wine as vegan or vegetarian is a marketing ploy’ reflects the low level of awareness of the use of animal products in winemaking as previously established by this research. Therefore, it is logical that some consumers may be sceptical of the need to produce animal-free wine.

To gain a deeper understanding of the barrier ‘the use of animal products in wine is less important to me than other attributes of the wine’, the relative importance of vegan and vegetarian winemaking is examined by this research.

The barrier ‘vegan/vegetarian wine is not available where I shop’ and ‘I am hesitant to choose VVW because it limits my selection’ reflect the current niche size of the category. As cited previously, none of Canada’s three largest liquor boards currently designate a VVW category. These barriers are likely to diminish with the development of the VVW category.

As previously identified, a share of consumers has a negative attitude toward VVW. It is likely that the consumers who indicate that 'the use of animal products in wine is not important to me' are outside of the target market for VVW.

The statement 'products labelled as vegan or vegetarian are unappealing' was included to test for the backlash toward veganism identified in the literature review (Dhont & Stoeber, 2020; Markowski & Roxburgh, 2019; Potts & Perry, 2010). While the survey reveals that it is not a top barrier, it is still a factor for some consumers.

An association of VVW with lower quality is the least prevalent of the barriers, but it is a factor for some consumers. According to Jancis Robinson MW (2018), the choice of fining agent should have no impact on wine quality or taste. [redacted]

Consumers were asked to rank a list of attributes in order of importance when deciding to purchase wine (Table 12). Price as a leading choice cue (Mueller et al., 2009 cited in Coyle, 2015) was not included in the choice attribute options.

Table 12: Share of consumers who chose each attribute as most important

Attribute	Share of consumers who chose each attribute as most important n=821
Grape variety	40%
A familiar brand	31%
The region of origin	19%
Vegan winemaking	3%
Vegetarian winemaking	2%
I don't know	6%

Consistent with Phase 1 and Berghoef and Dodds (2011), the grape variety is the most important choice attribute to consumers. Brand and region follow while a small percentage consider vegan winemaking (3%) and vegetarian winemaking (2%) to be the most important attributes. Therefore, it is unlikely that consumers will forgo their preferred grape variety, brand or region to purchase a VVW; however, for consumers who view VVW positively, the additional attribute of vegan or vegetarian winemaking could potentially sway their purchase.

More vegetarians (7%) and OR (4%) select vegetarian winemaking as their top attribute and more vegans select vegan winemaking as their top attribute (17%). A large majority, however, do not consider vegan and vegetarian winemaking their top attribute. These results indicate that even for consumers with the consumption preference to reduce or eliminate animal consumption, vegan and vegetarian winemaking does not necessarily replace other prioritized attributes.

Consistent with the attitudes toward VVW established previously in this research, fewer omnivores (0%) and 55+ (0%) identify vegetarian winemaking as their top choice attribute.

When deciding to purchase wine, 11% of consumers indicate that vegan winemaking is important or very important and 13% consider vegetarian winemaking important or very important. Aligned with trends established throughout this research, more vegetarians (47%), vegans (48%), OR (16%) and U34 (17%) and fewer omnivores (7%) and 55+ (5%) consider vegan winemaking important or very important. Similarly, more vegetarians (69%), vegans (61%), OR (19%) and U34 (24%) and fewer omnivores (8%) and 55+ (5%) consider vegetarian winemaking important or very important. The share of consumers who consider vegan and vegetarian winemaking important is larger than the share who are currently purchasing VVW, suggesting an opportunity for growth.

The majority of consumers (66%) agree or strongly agree with: ‘all products used in the winemaking process should be listed on the label’ (66%), ‘animal products used in the winemaking process should be listed on the label’ (60%) and ‘animal products used in the winemaking process should be listed on the label even if they are completely filtered out of the final wine’ (56%). This result is consistent with Pabst, Szolnoki, & Loose (2019), who found the majority of consumers prefer to see products used in the winemaking process listed on the label.

More vegetarians (80%) and OR (69%) think that animal products used in the winemaking process should be listed on the label. More vegans (85%), vegetarians (86%) and OR (67%) and fewer omnivores (50%) think that animal products used in the winemaking process should be listed on the label even if they are completely filtered out of the final wine.

Consumers who indicate that they are *likely* to purchase VVW were asked which label terms they prefer. Concerning VGW, no significant differences exist between the options presented: animal-free (31%), vegetarian-certified (30%), plant-based (28%) and vegetarian-friendly (27%). Concerning VW, there are no significant differences between the three most preferred labels: animal-free (29%), vegetarian-certified (28%) and plant-based (27%), however, significantly fewer consumers prefer vegetarian-friendly (20%). More vegetarians prefer vegetarian-friendly (44%), which is their top choice for VW. More vegans prefer plant-based (60%) which is their top choice for VW. Labelling VVW animal-free or plant-based versus vegan or vegetarian could help to reduce any negative associations some consumers make with vegan or vegetarian products.

5.3F Phase 3 summary

Confirming the Phase 1 results, the Phase 3 survey reveals that consumers have a simplified understanding of winemaking and few realize that animal products are sometimes used to make wine.

The results show that while awareness of the VVW category is limited, the awareness of VGW is growing compared to previous levels established by Wine Intelligence (2019). The majority of consumers with preferences to reduce/avoid animal substances are unaware of VVW alternatives. If these consumption groups have a positive attitude toward VVW, the lack of awareness of VVW among vegans, vegetarians and OR represents an opportunity for category growth.

Awareness of VVW is higher among U34 and Ontarians and lower among 55+ and Quebecers. This research establishes the attitudes toward VVW to determine whether these subgroup variances represent an opportunity for growth.

While few consumers purchased VVW in the past six months, a higher share of the consumers aware of the category purchased it. This suggests that the limited size of the VVW category is due, in part, to a lack of awareness. The survey reveals several purchasing patterns aligned with consumption preferences and VVW awareness.

The research shows that a higher share of consumers indicate that they are *likely* to purchase VVW compared to the share who purchased in the past six months. While this suggests an opportunity for growth of the VVW category, more than a third of consumers are ‘not very likely’ or ‘not at all likely’ to buy VVW. The results illustrate several purchasing trends that align with consumption preferences and current market trends. Based on their indications of likelihood to purchase, the results indicate that the highest appeal for VVW is among vegans, vegetarians, OR and U34 and the lowest appeal is among omnivores, 55+ and consumers from ‘other provinces’. These results illustrate a potential market for VVW beyond the limited share of consumers who identify as vegan or vegetarian.

One in five consumers agree or strongly agree that VVW is ‘right for people like me’, including a higher share of vegans, vegetarians, OR, U34 and fewer omnivores and 55+. Additionally, more consumers from ‘other provinces’ disagree or strongly disagree (53%) with ‘VGW is right for people like me’.

Considering consumers’ intent to purchase VVW and their level of agreement/disagreement with the statement ‘vegan/vegetarian wine is right for people like me’, the results indicate that 21% of consumers have a positive attitude toward VGW, 24% have a positive attitude toward VW, 36% have a negative attitude toward VGW and 33% have a negative attitude toward VW. The remaining 43% of consumers are considered to have a neutral attitude toward VVW. More vegans, vegetarians, OR and U34 have a positive attitude toward VVW, more omnivores have a negative attitude toward VVW and more consumers from the ‘other provinces’ have a negative attitude toward VGW.

Several motivations to purchase VVW align with the trend toward ethical consumerism (Mileham, 2019; Wine Intelligence, 2020B) which is likely to provide momentum to awareness and growth of the VVW category.

Consumers’ motivation to purchase wine that suits the ‘preference of the people drinking the wine’ expands the VVW category beyond those who consider VVW right for themselves. This explains why a larger share of consumers indicate they are *likely* to purchase VVW, compared to the share that considers VVW ‘right for people like me’. The results show that the target market for VVW is not limited to vegan and vegetarians, OR and U34: it extends to those purchasing for others who would prefer animal-free wine. Additionally, curiosity and the view that the use of animal products in wine is unappealing are top purchase motivations for VGW.

Consumers identify several key barriers to purchase VVW: ‘VVW is more expensive than non-VVW’, ‘labelling wine as vegan or vegetarian is a marketing ploy’, ‘VVW is not available where I shop’ and ‘the use of animal products in wine is less important to me than other attributes of the wine’. ‘The use of animal products in wine is not important to me’ is also a top purchase barrier for VW.

Controlling winemaking costs, increasing consumer education and increasing distribution of VVW alternatives may reduce the first three barriers; however, it is likely that the majority of those who consider the use of animal products in wine to be unimportant is not the target market for the VVW category. The relative importance of vegan and vegetarian winemaking compared to other attributes is also examined by this research.

The research shows that the share of consumers who consider vegan and vegetarian winemaking important and the share who are *likely* to purchase in the category are larger than the share who are currently purchasing VVW. While this finding suggests an opportunity for category growth, few consumers consider animal-free winemaking to be of top importance. The results show that consumers are unlikely to compromise their choice of preferred grape variety, brand or region to purchase a VVW; however, for consumers who view VVW positively, the additional attribute of animal-free winemaking could draw their purchase.

The literature review establishes that consumers are demanding to know more about the production of consumables (Label Insight, 2016) and prefer all winemaking substances to be listed on the label (Pabst, Szolnoki, & Loose, 2019). The survey reveals that the majority of consumers agree. This perspective is more prevalent among vegans, vegetarians and OR and less prevalent among omnivores. In response, producers will need to increase label transparency, which in turn will generate a higher awareness of the use of animal products in winemaking and the VVW category. Based on the conclusions of this research, it is expected that the VVW category will grow as a result.

The survey indicates that consumers do not have a clear preference for labelling VVW. While certified labels can add credibility (Cazrnezki, et al., 2014) the terms ‘animal-free’ or ‘plant-based’ can be used to avoid potential negativity toward vegan and vegetarian products.

6. Recommendations and conclusions

The share of consumers with a positive attitude toward VVW provides a sufficient reason to develop the category in Canada. Recognizing that a larger share of consumers has a negative attitude toward VVW, it is recommended that a smaller VVW category be developed within a larger non-VVW selection.

The largest share of consumers has neither positive or negative attitudes toward VVW, therefore is considered to have neutral attitudes toward the category. While these consumers are not likely to purchase VVW for themselves, the results indicate that a significant share of consumers are motivated to purchase based on the preference of others. It is recommended that the trade capitalize on this opportunity by raising the awareness of the VVW category through industry and consumer education.

The results show higher shares of vegetarians, vegans, OR and U34 have positive attitudes toward VVW, a higher share of omnivores has a negative attitude toward VVW, and more consumers from the 'other provinces' have a negative attitude toward VGW. To meet the needs of the largest number of consumers, it is recommended that the marketing of VVW targets those subgroups with more positive attitudes and avoids the subgroups with more negative attitudes toward the category.

Based on the limited share of consumers who consider vegan and vegetarian winemaking their top choice attribute, it is unlikely that consumers will forgo their preferred grape variety, brand or region to purchase VVW. At the same time, the significant share of consumers who indicate they are likely to purchase VVW, indicates that offering vegan or vegetarian winemaking in addition to meeting consumers' other attribute needs is likely to attract purchases from some consumers. This strategy is recommended to provide producers and retailers an advantage in the competitive Canadian market.

In comparing the opportunity between VGW and VW, this research establishes that consumer awareness and the trade perspective favour VGW, while more consumers indicate that they are likely to purchase VW. While a slightly higher share of consumers has a positive attitude toward VW and slightly more consumers have a negative attitude toward VGW the differences are not significant. Therefore, it is recommended that both VW and VGW categories be developed in Canada.

The alignment of key purchase motivations with larger global trends such as ethical consumerism (Mileham, 2019; Wine Intelligence, 2020B) and a demand for transparency in labelling (Label Insight, 2016; Nielsen/ Harris poll cited in Thach, 2020) is expected to build awareness and interest in VVW. Therefore, it is recommended that those marketing VVW capture this momentum by drawing on the connections between these consumer motivations and the category.

The results show, a key purchase barrier for VVV is ‘VVW is more expensive than non-VVW’. For the VVW category to grow, it must offer sufficient value to consumers, especially in light of the recession expected to follow the COVID-19 pandemic (Wine Intelligence, 2020B). During challenging economic times consumers may become less interested in alternative wines, especially if they cost more (Wine Intelligence, 2020B). It is recommended that producers attempt to control winemaking costs when producing VVW to avoid passing on any additional costs to the consumer.

The results show that a key factor in the current VVW market’s limited size is a lack of awareness of both the use of animal products in winemaking and of VVW alternatives. A much higher share of those aware of VVW was found to have purchased within the category suggesting an opportunity for category growth with increased consumer education. Consumer education will also add perceived value to VVW and help to overcome the purchase barrier ‘labelling wine as vegan or vegetarian is a marketing ploy’. Results from all three research phases indicate that consumer knowledge of the winemaking process is limited, therefore it is recommended that communication regarding VVW should be high-level and easy to understand.

Establishing increased distribution and developing the VVW category will increase consumer awareness while helping to reduce the barrier: ‘VVW is not available where I shop’.

While consumers do not have one preferred label for VVW, it is recommended that producers use the label animal-free or plant-based to minimize negative associations consumers may have with vegan or vegetarian products. This strategy will also overcome the need for certification, circumventing the current challenge of a lack of a unified definition for the terms, ‘vegan’ and ‘vegetarian’.

In conclusion, this research establishes an opportunity to grow the VVW category based on 1) the higher share of purchasing customers in the aware market compared to the total market 2) the share of consumers who have a positive attitude toward VVW 3) a top motivation is purchasing for ‘the preference of others’ and 4) the alignment of other top purchase motivations with the global trends of ethical consumerism and transparency in labeling. Recognizing the relative share of consumers with negative attitudes toward VVW, this research recommends that the VVW category be developed within a larger non-VVW portfolio and marketing of VVW be directed to the subgroups with the most positive attitudes toward the category. The recommendations and conclusions developed in this research provide a deeper understanding of consumers' attitudes toward VVW in Canada.

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8. Appendix

8.1 Phase 1 survey questions

Please state your name.

Please circle the answer that describes your age.

- Under 20
- 20-29
- 30-39
- 40-49
- 50-59
- 60+
- Prefer not to answer

Please state your occupation.

Do you live in Canada?

Which province do you live in?

Thinking about the past year, which statement describes most closely how often you drink wine?

- Never
- Less that once a month
- Once a month
- A few times a month
- Once a week
- A few times a week
- Daily

Do you have any dietary requirements or intolerances, such as gluten free, allergies, etc.?

Which of the following best describes you?

- Vegetarian: consumes eggs and or milk, but no other animal products
- Vegan: does not consume any animal products.
- Flexitarian: has an intention to reduce their intake of animal products.
- Omnivore: consumes animal products.

1. Which descriptors do you associate with wine? Please indicate Y next to all that apply.

Descriptor	I associate this descriptor with “wine”
Healthy	
Expensive	
Natural	
Affordable	
Modern	
Special Occasion	
Delicious	
Unhealthy	
Traditional	
Good-value	
Unnatural	
Unhealthy	
Everyday	
Old-fashioned	
Social	
Food-friendly	
Hard to find	
Over-priced	
Trendy	
Political	
Gimmicky	
Please list any other descriptors you associate with “wine”	

2. Which products are commonly used in winemaking? Indicate Y next to all products that you think definitely are used in winemaking. Indicate N next to all products that you think are definitely not used in winemaking. Indicate NS next to all products that you are not sure if they are used in winemaking or not.

Product	**Is this product used in winemaking?**
Sugar	
Eggs	
Grapes	
Milk	
Flour	
Bone	
Water	
Sulphur dioxide	
Shell	
Blood	
Fish	
Yeast	
Oak powder	
Citric Acid	
Colouring agents	

3. Please indicate Y next to all wines you have heard of before. Indicate N next to wines you have not heard of before and NS next to all of the wines you are not sure if you have heard of before.

Wine	**Have you heard of this wine before?**
Organic	
Bio-Dynamic	
Vegan	
Vegetarian	
Sulphite-free	
Low-Alcohol	

4. Please indicate Y next to all wines you have purchased in the last 6 months. Indicate N next to wines you have not purchased in the last 6 months and NS next to all of the wines you are not sure if you have purchased in the last 6 months.

Wine	**Have you purchased in the last 6 months?**
Organic	
Bio-Dynamic	
Vegan	
Vegetarian	
Sulphite-free	
Low-Alcohol	

5. What do you think makes a wine vegetarian?

6. What do you think makes a wine vegan?

7. Eggs, milk, fish and bone are commonly used as part of the winemaking process. Is this information likely to impact your future wine purchases?

a. I was unaware of this information however it is not likely to change my future wine purchases.

b. I was unaware of this information and it is likely to reduce my future wine purchases.

c. I was unaware of this information and it is likely to increase my future wine purchases.

d. I was unaware of this information; I am not sure how it might impact my future wine purchases.

e. I was unaware of this information. It is likely to affect the wines that I purchase but not likely to increase or decrease the overall amount of wine I purchase.

f. I was already aware of this information therefore it is not likely to change my future wine purchases.

g. Other _________

8. Do you consider vegetarian wine a fit for people like yourself?

a. I consider vegetarian wine a fit for people like myself most of the time.

b. I consider vegetarian wine a fit for people like myself occasionally.

c. Vegetarian wine is not a fit for people like myself.

d. I'm not sure if vegetarian wine is a fit for people like myself.

9. If quality, price and taste were the same how likely are you to purchase a vegetarian wine versus a non-vegetarian wine?

a. Extremely likely

b. Very likely

c. Somewhat likely

d. Not very likely

e. Not at all likely

10. If you responded a b or c what is your reason? Please indicate all that apply.

a. Concern for animal welfare

b. Concern for the environment

c. Concern for allergies

d. Concern for my health other than concern for allergies

e. I believe that the use of animal products in wine is unnecessary

f. I find the use of animal products in wine unappealing

g. None of the above

h. Not sure

i. Other

11. If you responded d or e what is your reason? Please indicate all that apply.

    a. Vegetarian wine is not available where I shop

    b. The use of animal products in wine is not important to me

    c. The use of animal products in wine is less important to me than other attributes of the wine

    d. Vegetarian wine is more expensive than non-vegetarian wine

    e. Vegetarian wine is lower quality than non-vegetarian wine

    f. Labelling wine as vegetarian is a marketing ploy

    g. None of the above

    h. Not sure

    i. Other

12. If yes, which wine label term, if any do you prefer? Why?

    a. Vegetarian-friendly

    b. Vegetarian-certified

    c. Animal-free

    d. Plant-based

    e. Not sure

    f. Something else ________

13. Do you consider vegan wine a fit for people like yourself?

    a. I consider vegan wine a fit for people like myself most of the time.

    b. I consider vegan wine a fit for people like myself occasionally.

    c. Vegan wine is not a fit for people like myself.

    d. I'm not sure if vegan wine is a fit for people like myself.

14. If quality, price and taste were the same how likely would you be to choose to purchase a vegan wine versus a non-vegan wine?

a. Extremely likely

b. Very likely

c. Somewhat likely

d. Not very likely

e. Not at all likely

15. If you responded a, b or c, what is your reason? Please indicate all that apply.

a. Concern for animal welfare

b. Concern for the environment

c. Concern for allergies

d. Concern for my health other than concern for allergies

e. I believe that the use of animal products in wine is unnecessary

f. I find the use of animal products in wine unappealing

g. None of the above

h. Not sure

i. Other

16. If you responded d or e, what is your reason? Please indicate all that apply.

a. Vegan wine is not available where I shop

b. The use of animal products in wine is not important to me

c. The use of animal products in wine is less important to me than other attributes of the wine

d. Vegan wine is more expensive than non-vegan wine

e. Vegan wine is lower quality than non-vegan wine

f. Labelling wine as vegan is a marketing ploy

g. None of the above

h. Not sure

i. Other

17. If yes, which wine label term do you prefer? Why?

a. Vegan friendly

b. Vegan certified

c. Animal-free

d. Plant-based

e. Not sure

f. Something else ________

18. Please indicate Y to all products you would prefer to see listed on the label if they are used in the winemaking process.

Product	I would prefer to see this listed on the label
Sugar	
Eggs	
Grapes	
Milk	
Flour	
Bone	
Water	
Sulphur dioxide	
Shell	
Blood	
Fish	
Yeast	
Oak powder	
Citric Acid	
Colouring agents	
I would prefer to see all of the products used in winemaking listed on the label.	
It is not necessary to list any of the products used in winemaking on the label.	

19. If any animal products used in the winemaking process were filtered out, would you still want to know that they had been used?

a. Yes

b. No

c. Not sure

d. Other ___________

20. Which descriptors do you associate with vegetarian products? Please indicate Y next to all that apply.

Descriptor	**I associate this descriptor with "vegetarian products"**
Healthy	
Expensive	
Natural	
Affordable	
Modern	
Special Occasion	
Delicious	
Unhealthy	
Traditional	
Good-value	
Unnatural	
Unhealthy	
Everyday	
Old-fashioned	
Social	
Food-friendly	
Hard to find	
Over-priced	
Trendy	
Political	
Gimmicky	
Please list any other descriptors you associate with "vegetarian products"	

21. Which descriptors do you associate with vegan products? Please indicate Y next to all that apply.

Descriptor	**I associate this descriptor with “vegan products”**
Healthy	
Expensive	
Natural	
Affordable	
Modern	
Special Occasion	
Delicious	
Unhealthy	
Traditional	
Good-value	
Unnatural	
Unhealthy	
Everyday	
Old-fashioned	
Social	
Food-friendly	
Hard to find	
Over-priced	
Trendy	
Political	
Gimmicky	
Please list any other descriptors you associate with “vegan products”	

22. From the pairs of attributes listed below, please circle the attribute that is more important to you when considering future wine purchases.

- Brand / Vegetarian winemaking / Neither
- Grape variety / Vegetarian winemaking / Neither
- Region of Origin / Vegetarian winemaking / Neither
- Brand / Grape Variety / Neither
- Brand / Region of Origin / Neither
- Region of Origin / Grape variety / Neither
- Brand / Vegan winemaking / Neither
- Grape variety / Vegan winemaking / Neither
- Region of Origin / Vegan winemaking / Neither
- Vegetarian winemaking / Vegan winemaking / Neither

23. Would you like to learn more about vegan wine?

24. Would you like to learn more about vegetarian wine?

25. Do you have any other comments regarding vegetarian or vegan wine that you would like to add?

8.2 Phase 2 survey questions

For the questions below, Canadian consumers are defined as people living in Canada, who are 19 years of age or older and who consume wine at least once a month.

This research defines vegetarian wine as wine produced without animal products other than dairy or egg and vegan wine as wine made without the use of any animal products.

What is your name?

What is your occupation?

Are you involved in selling wine in Canada? Which province(s)?

What is your key distribution channel?

Are you involved in selling wine outside of Canada? Which markets?

Which of the following best describes you?

a. Vegetarian: consumes eggs and or milk, but no other animal products

b. Vegan: does not consume any animal products

c. Flexitarian: has an intention to reduce their intake of animal products

d. Omnivore: consumes animal products

1. In your opinion, are the Canadian wine trade and those involved in selling wine in Canada aware that animal products are commonly used in winemaking?

a. Most of the trade is aware

b. A limited segment of the trade is aware

c. The trade is largely unaware

d. Other _________

2. Now thinking about Canadian consumers, how aware are they of winemaking processes that use animal products?

a. Most consumers are aware

b. A limited segment of consumers are aware

c. Consumers are largely unaware

d. Other _________

3. Is vegan winemaking important to Canadian consumers at the moment?

a. Very important

b. Somewhat important

c. Not important

d. Other _________

4. In your opinion does the importance of vegan wine to Canadian consumers vary by province?

a. No

b. Yes. In which provinces is vegan wine most important? In which provinces is vegan wine least important?

c. I'm not sure

5. Is vegetarian winemaking important to Canadian consumers at the moment?

a. Very important

b. Somewhat important

c. Not important

d. Other _________

6. In your opinion does the importance of vegetarian wine to Canadian consumers vary by province?

a. No

b. Yes. In which provinces is vegetarian wine most important? In which provinces is vegetarian wine least important?

c. I’m not sure

7. Is there a demographic of Canadian consumers that is more interested or less interested in vegan wine? If so, please describe them.

8. Is there a demographic of Canadian consumers that is more interested or less interested in vegetarian wine? If so, please describe them.

9. In your opinion, is there a difference in the importance of vegan wine to Canadian consumers in retail versus on premise?

a. There is no difference

b. Retail consumers are more interested in vegan wine than “on premise” consumers

c. “On premise” consumers are more interested in vegan wine than retail consumers

10. In your opinion, is there a difference in the importance of vegetarian wine to Canadian consumers in retail versus on premise?

a. There is no difference

b. Retail consumers are more interested in vegetarian wine than “on premise” consumers

c. “On premise” consumers are more interested in vegetarian wine than retail consumers

11. Do you expect Canadian consumers to become more interested in vegan wine in the future?

a. I expect the level of interest to increase significantly

b. I expect the level of interest to increase slightly

c. I expect the level of interest to remain the same

d. I expect the level of interest to decrease significantly

e. I expect the level of interest to decrease slightly

12. Do you expect Canadian consumers to become more interested in vegetarian wine in the future?

a. I expect the level of interest to increase significantly

b. I expect the level of interest to increase slightly

c. I expect the level of interest to remain the same

d. I expect the level of interest to decrease significantly

e. I expect the level of interest to decrease slightly

13. Have you received inquiries from Canadian consumers regarding vegan wine?

a. We have received a large number of consumer inquiries

b. We have received a small number of consumer inquiries

c. We have not received any consumer inquiries

14. Have you received inquiries from Canadian consumers regarding vegetarian wine?

a. We have received a large number of consumer inquiries

b. We have received a small number of consumer inquiries

c. We have not received any consumer inquiries

15. What do you believe are the Canadian consumer's motivations for seeking out vegan wine? Please circle all that apply.

a. Concern for animal welfare

b. Concern for the environment

c. Concern for allergies

d. Concern for health other than concern for allergies

e. They feel that the use of animal products in wine is unnecessary

f. They feel that the use animal products in wine is unappealing

g. Fashion/ social trend / media focus

h. Other __________

16. What do you believe are the Canadian consumer's motivations for seeking out vegetarian wine? Please circle all that apply.

a. Concern for animal welfare

b. Concern for the environment

c. Concern for allergies

d. Concern for health other than concern for allergies

e. They feel that the use of animal products in wine is unnecessary

f. They feel that the use animal products in wine is unappealing

g. Fashion/ social trend / media focus

h. Other __________

17. Do you think that learning that animal products were commonly used to make their preferred wine would impact Canadian consumer's purchase behaviour?

a. This information is not likely to change consumer's future wine purchases

b. This information is likely to reduce consumer's future wine purchases

c. This information is likely to increase consumer's future wine purchases

d. I am not sure how this information might impact consumer's future wine purchases

e. This information is likely to affect the wines that consumer's purchase but not likely to increase or decrease the overall amount of wine purchases

f. Other __________

18. Do you think that their purchase behaviour would be impacted if Canadian consumers learned that any animal products used to make their preferred wine were filtered out?

a. This information is not likely to change consumer's future wine purchases

b. This information is likely to reduce consumer's future wine purchases

c. This information is likely to increase consumer's future wine purchases

d. I am not sure how this information might impact consumer's future wine purchases

e. This information is likely to affect the wines that consumer's purchase but not likely to increase or decrease the overall amount of wine purchases

f. Other __________

19. Would the availability of vegan wine alternatives impact Canadian consumer’s behaviour?

a. Availability is not likely to change consumer’s future wine purchases.

b. Availability is likely to reduce consumer’s future wine purchases.

c. Availability is likely to increase consumer’s future wine purchases.

d. I am not sure how availability might impact consumer’s future wine purchases.

e. Some consumers are likely to select vegan wine alternatives, however the overall wine category is not likely to increase or decrease.

f. Other __________

20. Would the availability of vegetarian wine alternatives impact Canadian consumer’s behaviour?

a. Availability is not likely to change consumer’s future wine purchases.

b. Availability is likely to reduce consumer’s future wine purchases.

c. Availability is likely to increase consumer’s future wine purchases.

d. I am not sure how availability might impact consumer’s future wine purchases.

e. Some consumers are likely to select vegetarian wine alternatives, however the overall wine category is not likely to increase or decrease.

f. Other __________

21. Has your company done any research with respect to consumer attitudes toward vegan or vegetarian wine?

a. Yes. Which market?

b. No

c. Not yet, but this is an area that we are interested in researching.

Which market?

22. Does your organization currently market wines as vegan in Canada?

a. Yes

b. No

c. Not yet, but this is an area that we are interested in testing

d. Not yet, but we plan to market wines as vegan in the future

23. Does your organization currently market wines as vegetarian in Canada?

a. Yes

b. No

c. Not yet, but this is an area that we are interested in testing

d. Not yet, but we plan to market wines as vegetarian in the future

24. Does your organization currently market wines as vegan in markets outside of Canada?

a. Yes. Which markets?

b. No

c. Not yet, but this is an area that we are interested in testing. Which markets?

d. Not yet, but this we plan to market wines as vegan in the future.

Which markets?

25. Does your organization currently market wines as vegetarian in markets outside of Canada?

a. Yes. Which markets?

b. No

c. Not yet, but this is an area that we are interested in testing. Which markets?

d. Not yet, but we plan to market wines as vegetarian in the future. Which markets?

26. Which label term, if any, do you believe Canadian consumers would prefer?

a. Vegan-/Vegetarian-friendly

b. Vegan-/Vegetarian-certified

c. Animal-free

d. Plant-based

e. Other _______

27. Are there any questions you would like answered or further comments you would like to share with respect to Canadian consumer's attitudes toward vegan or vegetarian wine?

28. In your experience are there markets outside of Canada in which vegan or vegetarian wine is important. Please indicate the market and specify if it is vegan wine, vegetarian wine or both that are important.

8.3 Phase 3 survey questions

What province or territory do you live in?

Which of the following age groups do you fall into?

Are you male or female?

Which of the following best describes your total household income before taxes last year?

How frequently do you drink wine for each of the following types of occasion? Please select one answer for each occasion.

[redacted]

- Less than once per month
- 1-3 times per month
- About once per week
- 2-5 times per week
- Every day / most days
- I don't drink wine on this type of occasion

Which of the following descriptions best represents you? Please select one answer.

- Vegetarian: I may consume eggs and / or dairy, but no other animal products
- Vegan: I do not consume any animal products at all
- Omnivore Reducing: I am intending to reduce my intake of animal products
- Omnivore: I consume animal products as part of my diet
- Pescatarian: I may consume fish, eggs and / or dairy but no other animal product.
- Pollo-pescatarian: I may consume chicken, fish, eggs and / or dairy but no other animal product.
- None of the above
- Not Sure

1. Below is a list of ingredients and substances that may or may not be used as part of the processes by which wine is made. Please select which of these you think are used in the winemaking process by clicking in the appropriate box. Please select all that apply.

- Sugar
- Eggs
- Grapes
- Milk
- Flour
- Water
- Gelatin
- Sulphur dioxide
- Shell
- Vanilla
- Fish
- Yeast
- Oak powder
- Black Pepper / White Pepper
- Citric acid
- Colouring agents
- None of the above

2. Below is a list of alternative wine types. Please indicate which of these wine types that you have heard of by clicking in the appropriate box. Please select all that apply.

- Organic
- Bio-Dynamic
- Vegan
- Vegetarian
- Sulphite-free
- Low-Alcohol
- None of the above

3. Please indicate which of the following wine types you have purchased in the last 6 months by clicking in the appropriate box. Please select all that apply.

- Organic
- Bio-Dynamic
- Vegan
- Vegetarian
- Sulphite-free
- Low-alcohol
- None of the above

4. For this next section, please note the following information: animal products such as egg, milk, fish and gelatin are commonly used in the winemaking process. They are filtered out of the final wine product completely or to the extent that only trace amounts remain. Non-animal alternatives are available and are also used. Vegetarian wine is wine produced without animal products, with the exception of dairy or egg, and vegan wine is wine made without the use of any animal products. Please rank the attributes below from 1 – 5 in terms of its relevant importance when making a decision to purchase wine, where 1 represents the attribute that is most important to you and 5 represents the attribute that is least important to you. Please rank each element. You can only select one rank per item.

- Grape variety
- A familiar brand
- The region of origin
- Vegetarian winemaking
- Vegan winemaking

- Rank 1
- Rank 2
- Rank 3
- Rank 4
- Rank 5
- I don't know

5 – 6. Please indicate how important each attribute is to you when making a decision to purchase wine. Please select one answer for each element.

- Grape variety
- A familiar brand
- The region of origin
- Vegetarian winemaking
- Vegan winemaking

1 - Not at all important

2 - Not important

3 - Neither important nor unimportant

4 - Important

5 - Very important

I don't know

7. If quality, price and taste were the same, how likely are you to purchase a vegetarian wine versus a non-vegetarian wine? Please select one answer.

- Extremely likely
- Very likely
- Somewhat likely
- Not very likely
- Not at all likely
- I don’t know

8. Which term, if any, would you prefer to see on a wine label? Please select all that apply.

- ‘Vegetarian-friendly’
- ‘Vegetarian-certified’
- ‘Animal-free’
- ‘Plant-based’
- Other, please specify
- None of the above

9. If quality, price and taste were the same, how likely are you to purchase a vegan wine versus a non-vegan wine? Please select one answer.

- Extremely likely
- Very likely
- Somewhat likely
- Not very likely
- Not at all likely
- I don’t know

10. Which term, if any, would you prefer to see on a wine label? Please select all that apply.

- ‘Vegan-friendly’
- ‘Vegan-certified’
- ‘Animal-free’
- ‘Plant-based’
- Other, please specify
- None of the above

11. You indicated you would consider purchasing vegetarian wine. Looking at the list below, please indicate how important each reason is to you when considering buying vegetarian wine. Please use the 1-5 scale where 1="Not at all important" and 5="Very important". Please select one answer for each element.

- Concern for animal welfare
- Concern for the environment
- Concern for allergies
- Concern for my health other than concern for allergies
- The belief that the use of animal products in wine is unnecessary
- The belief that the use of animal products in wine is unappealing
- Curiosity to try vegetarian wine
- The preference of the people who will be drinking the wine

1 - Not at all important

2 - Not important

3 - Neither important nor unimportant

4 - Important

5 - Very important

I don't know

12.You indicated you would consider purchasing vegan wine. Looking at the list below, please indicate how important each reason is to you when considering buying vegan wine. Please use the 1-5 scale where 1="Not at all important" and 5="Very important".

- Please select one answer for each element.
- Concern for animal welfare
- Concern for the environment
- Concern for allergies
- Concern for my health other than concern for allergies
- The belief that the use of animal products in wine is unnecessary
- The belief that the use of animal products in wine is unappealing
- Curiosity to try vegan wine
- The preference of the people who will be drinking the wine

1 - Not at all important

2 - Not important

3 - Neither important nor unimportant

4 - Important

5 - Very important

I don't know

13 – 21. Looking at the list below, please indicate the extent to which you agree with the following statements. Please use the 1-5 scale where 1="Strongly disagree" and 5="Strongly agree". Please select one answer for each element.

- Vegetarian wine is right for people like me
- Vegetarian wine is not available where I shop
- Vegetarian wine is more expensive than non-vegetarian wine
- Vegetarian wine is lower quality than non-vegetarian wine
- Products labelled as vegetarian are unappealing to me
- I am hesitant to choose vegetarian wine because it limits my selection
- Labelling wine as vegetarian is a marketing ploy
- Animal products used in the winemaking process should be listed on the label
- Animal products used in the winemaking process should be listed on the label even if they are completely filtered out of the final wine

1 - Strongly disagree

2 - Disagree

3 - Neither agree nor disagree

4 - Agree

5 - Strongly agree

I don't know

22 – 31. Looking at the list below, please indicate the extent to which you agree with the following statements. Please use the 1-5 scale where 1="Strongly disagree" and 5="Strongly agree". Please select one answer for each element:

- Vegan wine is more expensive than non-vegan wine
- Vegan wine is not available where I shop
- Vegan wine is lower quality than non-vegan wine
- Products labelled as vegan are unappealing to me
- I am hesitant to choose vegan wine because it limits my selection
- Labelling wine as vegan is a marketing ploy
- Vegan wine is right for people like me
- The use of animal products in wine is not important to me
- The use of animal products in wine is less important to me than other attributes of the wine
- All products used in the winemaking process should be listed on the label

1 - Strongly disagree

2 - Disagree

3 - Neither agree nor disagree

4 - Agree

5 - Strongly agree

I don't know

8.4 Approved RPP

IMW Research Paper Proposal Submission Form	
Student ID [redacted]	**Date of submission May 30, 2020**
RPP Version No [redacted]	**Name of Advisor Lynne Coyle**
Note: RPPs must be submitted via your Advisor to the IMW	
Proposed Title	
An investigation into consumer attitudes toward vegan and vegetarian wine in Canada.	
Research Questions: Define the subject of your Research Paper and specify the specific research questions you plan to pursue. (No more than 200 words) 197 words.	
According to Wine Intelligence, an opportunity exists for vegan and vegetarian wine (VVW) category growth with focused consumer marketing.[19] In Ireland, 36% of consumers preferred VVW symbols on labels (Coyle, 2015), while Andrew Shaw of Bibendum states, '…the trend of veganism has become profound in wine'.[20]	

[19] Jenkins, M., 2019. Canadian Sola: Opportunities in Sustainable, Organic and Lower Alcohol Wines 2019. Wine Intelligence, [online] Available at: <https://www.wineintelligence.com/downloads/canada-sola-2019/> [Accessed 22 September 2019].

[20] Eads, L., Bibendum: Top wine trends for 2019. The Drinks Business, [online] Available at: <https://www.thedrinksbusiness.com/2018/11/bibendum-top-wine-trends-for-2019/5/> [Accessed 25 October 2019].

Food consumption trends suggest that there may also be an opportunity for VVW in Canada. The number of vegetarian Canadians has increased by 156% to 2.3 million in the 15 years to 2018[21]. A further 850,000 Canadians are vegan[22]. In 2018, the Canadian meat and dairy-free alternatives category grew 14%, versus minimal growth in the overall FMCG category.[23] Additionally, while 27% of households purchase meat and dairy-alternatives, only 20% are actually vegan or vegetarian, indicating that the category has broader appeal.[24]

This research aims to investigate consumer attitudes[25] towards VVW in Canada.

With regard to Canadian wine consumers:

1) Do they hold positive, negative or neutral attitudes toward VVW?

2) What reasons do they provide for their attitudes towards VVW?

3) Which attribute, if any, is more important to them: VVW, brand, variety or region?

4) Which label term, if any, do they prefer: Vegan/Vegetarian friendly, Vegan/Vegetarian certified, animal-free or plant-based?

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[21] Flannigan, R., 2018. More than 3 million Canadians vegetarian or vegan: study. CTV News, [online] Available at: <https://www.ctvnews.ca/canada/more-than-3-million-canadians-vegetarian-or-vegan-study-1.4027606 >[Accessed 24 March 2019].

[22] Flannigan, R., 2018. More than 3 million Canadians vegetarian or vegan: study. CTV News, [online] Available at: <https://www.ctvnews.ca/canada/more-than-3-million-canadians-vegetarian-or-vegan-study-1.4027606 >[Accessed 24 March 2019].

[23] Neilson, 2018. Meat and Dairy Alternatives are a catalyst for Grocery Store Sales in Canada. Neilson, [online] Available at: <https://www.nielsen.com/ca/en/insights/article/2019/meat-and-dairy-alternatives-are-a-catalyst-for-grocery-store-sales/> [Accessed 9 November 2019].

[24] Neilson, 2018. Meat and Dairy Alternatives are a catalyst for Grocery Store Sales in Canada. Neilson, [online] Available at: <https://www.nielsen.com/ca/en/insights/article/2019/meat-and-dairy-alternatives-are-a-catalyst-for-grocery-store-sales/> [Accessed 9 November 2019].

[25] For this research attitudes are evaluated by the consumer’s intent to purchase and the extent to which they agree a product is “right for people like me.”

Background and Context: Explain what is currently known about the topic and address why this topic requires/offers opportunities for further research. (No more than 200 words) 200 words
In Canada, 9% of consumers are aware of vegan wine and 6% are aware of vegetarian wine.[26] Presumably, if vegans and vegetarians were aware of VVW they would seek to purchase it, however, of those aware, only 38% indicated they would consider purchasing vegan wine and 41% vegetarian wine.[27] Possibly, many of those aware are therefore not vegan or vegetarian. Further research is required to understand if there is a potential for greater awareness of VVW among the 8.5% of Canadians[28 29] who are vegan or vegetarian as well as to determine how important VVW is to consumers compared to other attributes. While trends may suggest a growth opportunity for VVW, previous research indicates that a stigma can be associated with veganism (Markowski and Roxburgh, 2018). Some consumers may appreciate knowing if a wine is vegan or vegetarian, however research has shown that ingredient labelling can also reduce the perception of wine as natural

[26] Wine Intelligence, 2019. Canadian Sola: Opportunities in sustainable, organic and lower alcohol wine July 2019. Wine Intelligence, [email] From Emily Carroll. Received 11 October 2019.

[27] Wine Intelligence, 2019. Canadian Sola: Opportunities in sustainable, organic and lower alcohol wine July 2019. Wine Intelligence, [email] From Emily Carroll. Received 11 October 2019.

[28] Flannigan, R., 2018. More than 3 million Canadians vegetarian or vegan: study. CTV News, [online] Available at: <https://www.ctvnews.ca/canada/more-than-3-million-canadians-vegetarian-or-vegan-study-1.4027606 >[Accessed 24 March 2019].

[29] STATCAN, 2018. Canada's population estimates: Total population July 1, 2018. STATCAN, [online] Available at: <https://www150.statcan.gc.ca/n1/daily-quotidien/180927/dq180927c-eng.htm> [Accessed 5 December 2019].

(Pabst, Szolnoki and Loose, 2019). Of further consideration is that interest in VVW may be motivated by allergy, health or animal welfare concerns.[30] Understanding of consumer attitudes toward VVW is necessary to define the opportunity's scale and to identify consumer populations to which VVW is most relevant.
Sources: Identify the nature of your source materials (official documents, books, articles, other studies, etc.) and give principal sources if appropriate. (No more than 150 words) 147 words

Charlebois, S., Somogyi, S., and Music, J., 2018. Plant-based dieting and meat attachment: Protein wars and the changing Canadian consumer (Preliminary Results). *Dalhousie University*, [online] Available at: <https://cdn.dal.ca/content/dam/dalhousie/pdf/management/News/News%20%26%20Events/Charlebois%20Somogyi%20Music%20EN%20Plant-Based%20Study.pdf>

Coyle, L., 2015. Ingredient labelling on wine: An investigation into Irish consumer attitudes. *Institute of Master of Wine*, [email] From Lynne Coyle. Received 5 September 2017.

Markowski, K., and Roxburgh, S., 2018. If I became a vegan, my family and friends would hate me. Anticipating vegan stigma as a barrier to plant-based diets. *Kent State University*, [online] Available at:

[30] Crosariol, B., 2018. Why wineries are finally starting to name-check their vegan wines. The Globe and Mail, [online] Available at: <https://origin.tgam.arcpublishing.com/life/food-and-wine/wine/vegan-wines-are-having-a-coming-out-party/article38355577/> [Accessed 10 October 2019].

<https://www.deepdyve.com/lp/elsevier/if-i-became-a-vegan-my-family-and-friends-would-hate-me-anticipating-FxxZi56I0S> [Accessed 9 November 2019].

Pabst, E., Szolnoki, G., and Loose, S., 2019. The effects of mandatory ingredient and nutrition labelling for wine consumers – A qualitative study. *Wine Economics and Policy,* 8, 5–15. [online] Available at: <https://reader.elsevier.com/reader/sd/pii/S2212977418300516?token=004ACEEAB4723FFF0CE84F24C79E73C7A519B13A93011B6304D6012C3D57133A59B43927B3655258D3A3A31E9243CE88> [Accessed 12 September 2019].

Wine Intelligence, 2018. Canada Landscapes March 2018 Report. *Wine Intelligence*, [email] From Eleanor Hickey. Received 10 April 2018.

Research Methodology: Please detail how you will identify and gather the material or information necessary to answer the research question(s) and discuss what techniques you will use to analyse this information. (No more than 500 words) 487 words

Definitions:

Wine consumers: People living in Canada, 19 or older, who consume wine at least once a month.

Consumption groups: Vegan, vegetarian, omnivore reducing[31] and omnivore.

[31] Omnivore reducing is defined as those who have an intention to reduce their intake of animal products. This includes pescatarian (may consume fish, eggs and / or dairy but no other animal product) and pollo-pescatarian (may consume chicken, fish, eggs and / or dairy but no other animal product.)

Neither the Canadian government (University of Toronto, 2018)[32] nor the International Organization of Vine and Wine (Food Standards Agency, 2015)[33] define ‘vegan’ or ‘vegetarian’. This research defines vegetarian wine as wine produced without animal products with the exception of dairy or egg and vegan wine as wine made without the use of any animal products.[34]

Methodology:

Phase One:

Fifteen wine consumers representing the consumption groups and living in five different provinces will be asked 25 questions relating to their awareness and interest in VVW. Insight gained will shape the questions in Phase Three.

Phase Two:

Twenty subjects who produce, sell, buy and market wine in Canada will be asked 28 questions to determine their perception of consumer interest in VVW in Canada and in various markets in which they sell. Insight gained will help to establish international trends, understand the potential for VVW in Canada and shape the questions in Phase Three.

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[32] University of Toronto, 2018. Vegan Food Standards. The University of Toronto, [online] Available at: <https://ueat.utoronto.ca/everythingfood/food-standards/vegan-food-standards/> [Accessed 22 August 2019].

[33] Food Standards Agency, 2015. Use of terms 'vegetarian' and 'vegan' in food labelling: Guidance. Food Standards Agency, [online] Available at: <https://webarchive.nationalarchives.gov.uk/+/https://www.food.gov.uk/northern-ireland/niregulation/niguidancenotes/veg-term-guidance>[Accessed 25 September 2019].

[34] Krebiehl, A., 2018. Is wine vegetarian, vegan or neither? Wine Enthusiast, [online] Available at: <https://www.winemag.com/2018/05/09/vegetarian-vegan-wine/ >[Accessed 12 September 2019].

Phase Three:

Wine consumers will complete a 31-question online survey asking about their knowledge of VVW, their affinity to the category compared to other attributes, the motivations behind their opinions and their preference of relative label terms. Wine Intelligence,[35] a market research company, was hired to advise on survey question optimization, deploy the survey and provide the survey results based on an analysis plan designed by the researcher. The survey results will be delivered in the form of descriptive statistics, frequencies and cross-tabs via Excel spreadsheet.

A pilot of the online survey will be conducted with 12 wine consumers to confirm clarity and length. As this will not contribute to the final results, the subjects will be individuals known by the researcher.

According to Wine Intelligence (2018), the population of Canadian wine consumers (as defined by this research) is 16.7 million. Wine Intelligence (2018) further established the demographics of Canadian wine consumers with respect to gender, age, income bracket and province of residence. Survey responses will be post-weighted to reflect these demographics. The subjects will not be pre-selected to represent consumption categories, as one of the aims of the research is to determine the representation of each of the categories in the population of wine consumers.

35 This online survey questions will be deployed along with other questions, unrelated to this study that are being tested by Wine Intelligence.

The table below outlines the population segments and variables that will be measured with respect to consumer's response to vegetarian wine. This process will be repeated for vegan wine.

	I have sought to purchase vegetarian wine.	Vegetarian wine is right for people like me.	I would consider buying vegetarian wine in the future.	Reasons to purchase or not to purchase.	Which attribute is most important?	Which label term is preferred?
Vegan						
Vegetarian						
Omnivore reducing						
Omnivore						
Gender						
Age						
Income bracket						
Province						

Methodological Limitations:

A potential discrepancy exists between consumer's indications of their intent to purchase and their actual purchasing behaviour.

The survey will generate approximately 1000[36] responses, which will generate a +/- 3.1% margin of error at the 95% confidence interval.

[36] 1000 responses is the typical response rate achieved by Wine Intelligence.

Potential to Contribute to the Body of Knowledge on Wine: Explain how this Research Paper will add to the current body of knowledge on this subject. (No more than 150 words) 150 words
Attitudes of wine consumers toward VVW have not been studied to date. Understanding the attitudes of sub-populations of consumers toward VVW will help to define the target market and size of the opportunity. Conclusions drawn from this research will provide direction for marketing the VVW category and are therefore valuable to sellers of wine in Canada, and elsewhere. The majority of vegan or vegetarian Canadians are under 35, suggesting longevity for this food consumption trend,[37] which could translate into a long-term opportunity for VVW. The attitudes of Canadian consumers towards VVW may represent a broader global trend, which inspires future research based on the methodology at hand. It is crucial to understand the impact of sharing detailed production information, as consumers may tend to over-simplify the production process.

[37] Flannigan, R., 2018. More than 3 million Canadians vegetarian or vegan: study. CTV News, [online] Available at: <https://www.ctvnews.ca/canada/more-than-3-million-canadians-vegetarian-or-vegan-study-1.4027606 >[Accessed 24 March 2019].

Proposed Time Schedule/Programme: This section should layout the time schedule for the research, analysis and write-up of the Research Paper and should indicate approximate dates with key deliverables. *Dates of submission to both Advisors and the IMW must be those specified by the IMW.*
October 27, 2019 Submit RPP to advisor. October 28, 2019 Submit RPP to RP Co-ordinators. December 2019 Submit RPP to RP Panel. October 28 to January 2019 Complete literature review. December 2019 Conduct Phase 1 and Phase 2 interviews and analyze results. December 2019 Deploy Phase Three pilot questionnaire and make final adjustments to online questionnaire. January 2020 Deploy Phase Three online questionnaire. January 2020 Collect results of online questionnaire. January 2020 Analyze results of online questionnaire. February 1, 2020 to March 2, 2020 Write RP. March 2, 2020 Submit RP to advisor for feedback. April 13, 2020 Confirm submission of final RP in June 2020. May 13, 2020 Deadline of final RP to advisor. June 25, 2020 Deadline of final RP to Institute.