WINE INTELLIGENCE

CANADA: WINE PACKAGING FORMATS

SEPTEMBER 2020

Wine Intelligence Ltd: 109 Maltings Place, 169 Tower Bridge Road, London SE1 3LJ Tel: 020 8194 0090. E-mail: info@wineintelligence.com.
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INTRODUCTION

Our 2020 study of wine packaging formats in the Canadian market suggests that the recent Covid-19 pandemic and associated lockdown is starting to unlock more possibilities in alternative formats driven by a younger generation shopping more for wine while the on-premise remains closed or restricted.

So far, these new trends remain small in absolute terms. While awareness levels of single serve (bottles or cans) has grown in the past year, even today fewer than 4 in 10 Canadian wine consumers are even aware that wine can come in a can, and only 6% say they have bought canned wine in the past 6 months.

Most of the growth in can awareness is coming from English-speaking provinces, while – for the moment at least – small formats seem to be going in reverse in Québec, where awareness levels are flat year-on-year and purchase rates have actually decreased for wine in a can.

Of greater interest from this report is the extent to which alternative formats generally, and cans in particular, are welcomed by those aged 21-39 – the Millennials and Gen-Z, whose purchasing power and preferences will shape the Canadian wine category for the next 30-40 years. A typical Millennial is no more likely to have come across wine in a can than anyone else, but they are nearly twice as likely to buy this format once they know about it.

The recent lockdown situation appears to have revived the bag-in-box market, which was trending downwards in terms of long-term usage but has had a renaissance in the past few months as restrictions on shopping encouraged bulk buying. As with small format, the bag-in-box boost seems to be coming from younger and more involved wine drinkers, who have historically avoided this format. More excitement is expected in bag-in-box in the coming months, as producers react to the change in the sales trend and bring more variety and innovation to bear to reach these recent converts.

As to motivations for smaller formats, the data offers some new interpretations to add to familiar tropes about younger drinkers seeking control, portability and moderation. While convenience is a key driver of can purchase, it is also seen as a low-risk, low-cost way of trialing new products or wine styles. In the end, the can could be as much about helping consumers on the discovery path in wine as it doubtless will be as a lightweight and portion-controlled alternative to a standard bottle.

MANAGEMENT SUMMARY

KEY TAKEAWAYS FROM CANADA PACKAGING 2020

- Awareness levels of single serve formats have increased in the past year
- Usage of small format containers (bottles or cans) remains low, but is growing among younger consumers
- Convenience and portability are the leading use cases for small format, alongside the opportunity to trial new products
- Bag-in-box has been trending downward over the past 12 months, but appears to have been revived by bulk buying during the Covid-related lockdown in Canada
- New recruits to bag-in-box appear to be younger and more highly involved drinkers, historically not a segment that have been active in this format

MANAGEMENT SUMMARY

Small format awareness growing, led by English-speaking provinces

Single serve bottles and cans are becoming more widely known, while overall knowledge about bag-in-box is decreasing

Packaging awareness: Tracking

% who are aware of the following packaging types
Base = All Canadian regular wine drinkers (n=1,000)

		All Canadian regular wine drinkers			English-Speaking Canadian			Québécois		
Rank		2019	2020	Tracking	2019	2020	Tracking	2019	2020	Tracking
2020	*n=*	*1,000*	*1,000*	vs. '19	*746*	*750*	vs. '19	*254*	*250*	vs. '19
1	Standard bottle (750ml)	92%	89%	↓	91%	90%	→	95%	87%	↓
2	Large bottle / magnum (1.5L)	74%	69%	↓	75%	69%	↓	72%	68%	→
3	Regular bag-in-box (3L)	64%	54%	↓	67%	57%	↓	56%	44%	↓
4	Half bottle (375ml)	51%	52%	→	48%	49%	→	60%	63%	→
5	Small bottle (single serve)	45%	49%	↑	44%	49%	↑	49%	50%	→
6	Large bag-in-box (4L)	n/a	46%	n/a	n/a	46%	n/a	n/a	44%	n/a
7	Tetra Pak (1L)	37%	34%	→	37%	34%	→	36%	35%	→
8	Wine in a can	30%	34%	↑	31%	38%	↑	26%	23%	→

n/a : packaging type was not tested in this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'19 and Jul'20, n=1,000 Canadian regular wine drinkers

MANAGEMENT SUMMARY

Younger consumers are more likely to connect with smaller format

Younger drinkers are significantly more likely to buy small format if they know it exists

Packaging conversion: By gender & age groups

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

			Gender		Age groups			
Rank 2020		All Canadian regular wine drinkers	Male	Female	19-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	1,000	507	493	67	316	251	366
1	Standard bottle (750ml)	90%	92%	88%	87%	93%	92%	87%
2	Large bottle / magnum (1.5L)	36%	40%	32%	57%	37%	39%	31%
3	Large bag-in-box (4L)	22%	19%	25%	18%	14%	20%	29%
4	Half bottle (375ml)	19%	19%	19%	45%	25%	18%	11%
5	Wine in a can	19%	15%	21%	43%	27%	15%	9%
6	Regular bag-in-box (3L)	15%	16%	15%	23%	19%	13%	14%
7	Small bottle (single serve)	14%	15%	13%	23%	20%	10%	9%
8	Tetra Pak (1L)	11%	13%	9%	12%	18%	14%	5%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

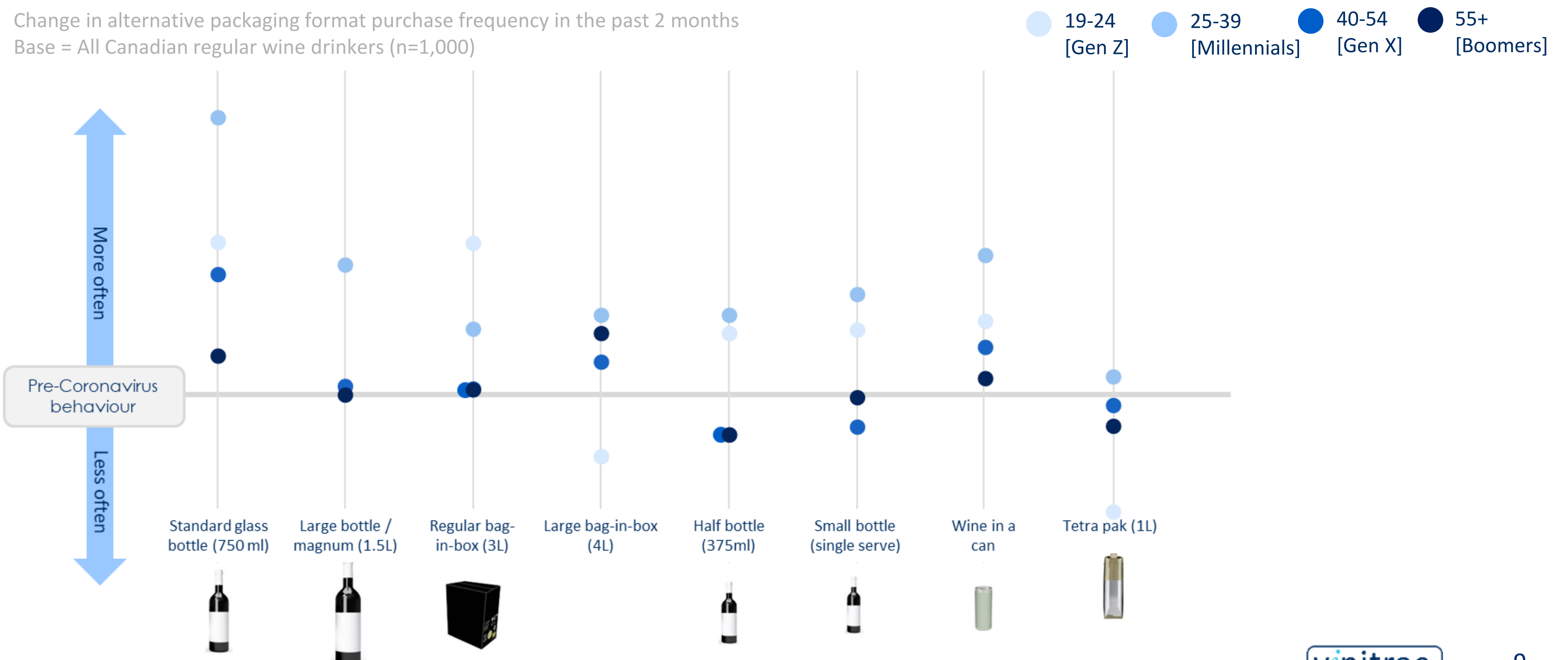
MANAGEMENT SUMMARY

Bag-in-box revival led by highly involved Millennials

Recent surge in bag-in-box purchasing led by younger, more highly involved wine drinkers

Packaging purchase frequency past 2 months: By age groups

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Canadian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

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PACKAGING FORMATS TESTED

Standard glass bottle (750 ml)

Large bottle / magnum (1.5L)

Half bottle (375ml)

Small bottle (single serve)

Wine in a can

Regular bag-in-box (3L)

Large bag-in-box (4L)

Tetra Pak (1L)

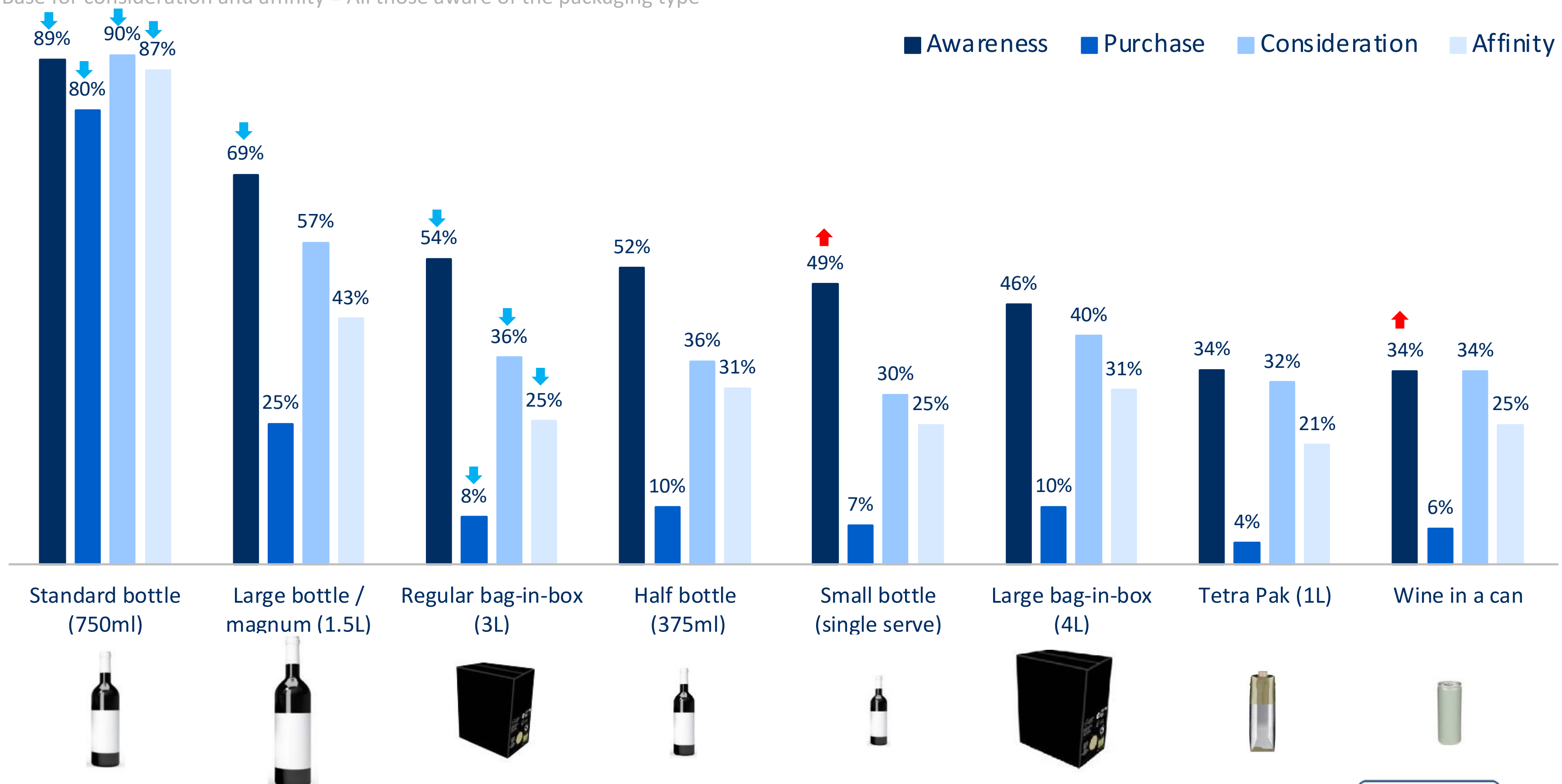
Packaging formats were shown in a randomised order to avoid bias

ATTITUDES TOWARDS PACKAGING FORMATS IN CANADA

Despite ranking first across all packaging measures, a declining proportion of Canadian consumers are purchasing and would consider purchasing standard 75cl bottles and regular bag-in-box (3L)

Packaging attitudes summary

% who are aware of the following packaging types
Base for awareness and purchase = All Canadian regular wine drinkers (n=1,000)
Base for consideration and affinity = All those aware of the packaging type



⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'19 and Jul'20, n=1,000 Canadian regular wine drinkers

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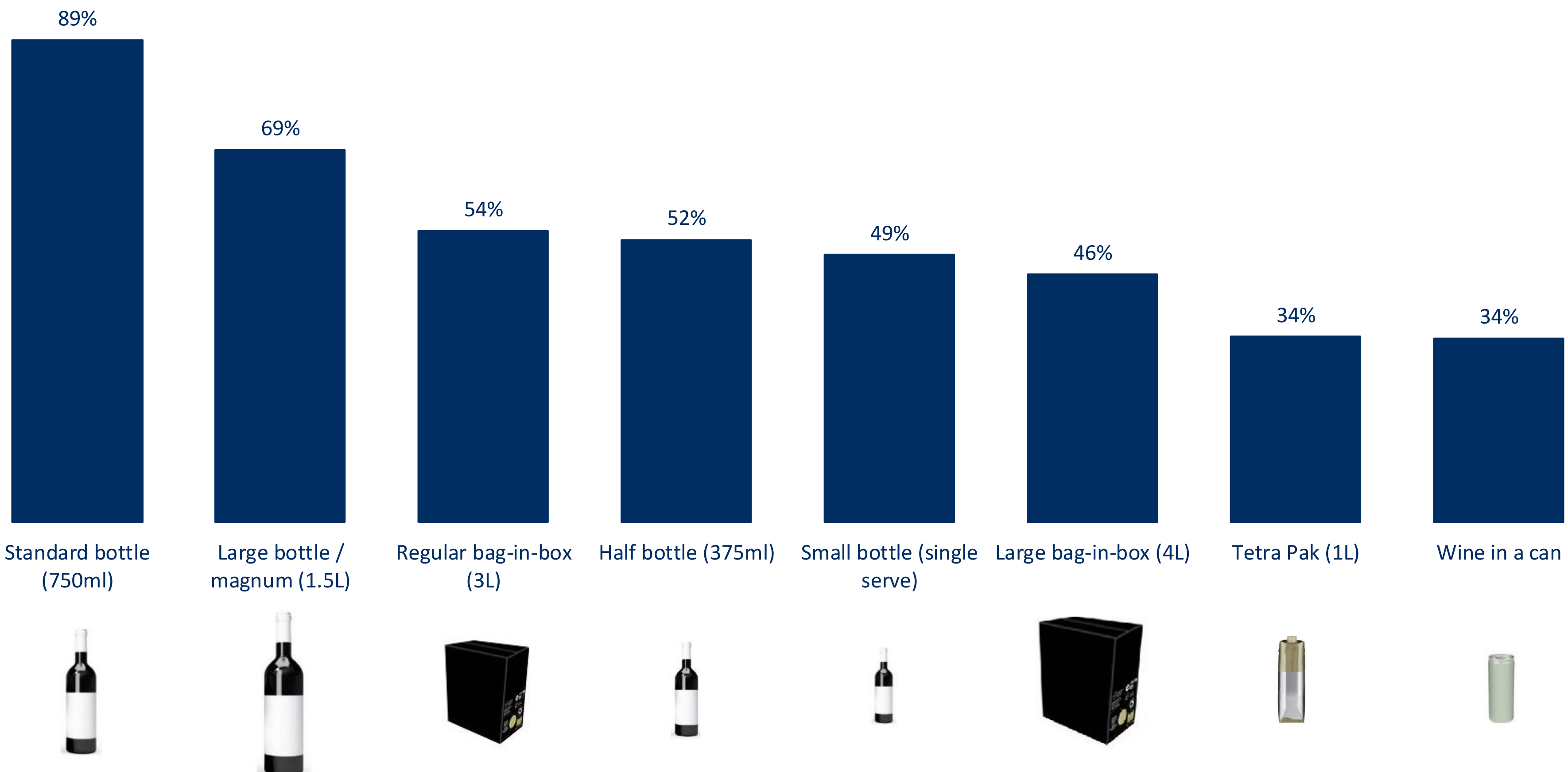
PACKAGING AWARENESS

High awareness level of all main alternative wine packaging formats in Canada, with Tetra-paks and cans still known by a third of Canadian regular wine drinkers

Packaging awareness

% who are aware of the following packaging types
Base = All Canadian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AWARENESS

There is a slight decrease in awareness for large bottles and regular (3L) bag-in-box formats, whilst awareness of single serve formats (bottle and can) are showing growth, particularly in English-speaking Canada

Packaging awareness: Tracking

% who are aware of the following packaging types
Base = All Canadian regular wine drinkers (n=1,000)

		All Canadian regular wine drinkers			English-Speaking Canadian			Québécois		
Rank		2019	2020	Tracking	2019	2020	Tracking	2019	2020	Tracking
2020	*n=*	*1,000*	*1,000*	vs. '19	*746*	*750*	vs. '19	*254*	*250*	vs. '19
1	Standard bottle (750ml)	92%	89%	↓	91%	90%	→	95%	87%	↓
2	Large bottle / magnum (1.5L)	74%	69%	↓	75%	69%	↓	72%	68%	→
3	Regular bag-in-box (3L)	64%	54%	↓	67%	57%	↓	56%	44%	↓
4	Half bottle (375ml)	51%	52%	→	48%	49%	→	60%	63%	→
5	Small bottle (single serve)	45%	49%	↑	44%	49%	↑	49%	50%	→
6	Large bag-in-box (4L)	n/a	46%	n/a	n/a	46%	n/a	n/a	44%	n/a
7	Tetra Pak (1L)	37%	34%	→	37%	34%	→	36%	35%	→
8	Wine in a can	30%	34%	↑	31%	38%	↑	26%	23%	→

WHAT DO MARKET EXPERTS SAY?

"The growth spot, but from a much lower base, is cans, small bottles and small (200ml) tetras. In part we think this is part of the moderation trend, because it reduces volume and possible overuse. I'm also thinking it is a way of trialing new products, which reduces risk. So if I like something in small format, I'll buy it in standard bottle"

Wine Producer and Importer, Canada

Wine Intelligence Trade Interview Programme 2020
n/a : packaging type was not tested in this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'19 and Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AWARENESS

Whilst English-speaking Canadians reflect similar awareness to all Canadian consumers, Québécois consumers are more likely to be aware of half bottles (375ml)

Packaging awareness: By Language

% who are aware of the following packaging types
Base = All Canadian regular wine drinkers (n=1,000)

Rank 2020		All Canadian regular wine drinkers	English-speaking Canadian	Québécois
	n=	*1,000*	*750*	*250*
1	Standard bottle (750ml)	89%	90%	87%
2	Large bottle / magnum (1.5L)	69%	69%	68%
3	Regular bag-in-box (3L)	54%	57%	44%
4	Half bottle (375ml)	52%	49%	63%
5	Small bottle (single serve)	49%	49%	50%
6	Large bag-in-box (4L)	46%	46%	44%
7	Tetra Pak (1L)	34%	34%	35%
8	Wine in a can	34%	38%	23%

Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AWARENESS

Mainstream Matures and Engaged Explorers, mid-aged and older confident wine drinkers, are more likely to be aware of most alternative types compared with other Portrait segments in Canada

Packaging awareness: By Portraits

% who are aware of the following packaging types
Base = All Canadian regular wine drinkers (n=1,000)

Rank 2020		All Canadian regular wine drinkers	Portraits: Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
	n=	*1,000*	*95*	*107*	*152*	*218*	*106*	*321*
1	Standard bottle (750ml)	89%	94%	80%	97%	83%	93%	90%
2	Large bottle / magnum (1.5L)	69%	77%	52%	82%	64%	73%	68%
3	Regular bag-in-box (3L)	54%	62%	35%	67%	49%	54%	54%
4	Half bottle (375ml)	52%	70%	54%	57%	51%	53%	45%
5	Small bottle (single serve)	49%	65%	39%	66%	49%	52%	40%
6	Large bag-in-box (4L)	46%	56%	39%	62%	41%	39%	43%
7	Tetra Pak (1L)	34%	47%	22%	51%	27%	26%	34%
8	Wine in a can	34%	50%	24%	39%	33%	45%	27%

Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AWARENESS

Older consumers (over 55) are more likely than others to be aware of a variety of alternative packaging types for wine, with regular bag-in-box (3L) awareness strongest among women

Packaging awareness: By gender & age groups

% who are aware of the following packaging types
Base = All Canadian regular wine drinkers (n=1,000)

			Gender		Age groups			
Rank 2020		All Canadian regular wine drinkers	Male	Female	19-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*507*	*493*	*67*	*316*	*251*	*366*
1	Standard bottle (750ml)	89%	86%	92%	78%	85%	90%	94%
2	Large bottle / magnum (1.5L)	69%	67%	70%	54%	62%	66%	79%
3	Regular bag-in-box (3L)	54%	48%	60%	39%	45%	53%	65%
4	Half bottle (375ml)	52%	53%	51%	48%	51%	51%	55%
5	Small bottle (single serve)	49%	46%	53%	53%	47%	45%	54%
6	Large bag-in-box (4L)	46%	45%	47%	36%	39%	47%	53%
7	Tetra Pak (1L)	34%	33%	36%	20%	30%	36%	39%
8	Wine in a can	34%	29%	39%	28%	37%	36%	32%

Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AWARENESS

No differences in terms of packaging awareness amongst wine involvement groups

Packaging awareness: By wine involvement

% who are aware of the following packaging types
Base = All Canadian regular wine drinkers (n=1,000)

Rank 2020		All Canadian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*232*	*398*	*370*
1	Standard bottle (750ml)	89%	89%	90%	88%
2	Large bottle / magnum (1.5L)	69%	71%	69%	67%
3	Regular bag-in-box (3L)	54%	57%	54%	52%
4	Half bottle (375ml)	52%	47%	54%	53%
5	Small bottle (single serve)	49%	48%	48%	52%
6	Large bag-in-box (4L)	46%	43%	44%	50%
7	Tetra Pak (1L)	34%	36%	32%	36%
8	Wine in a can	34%	33%	32%	37%

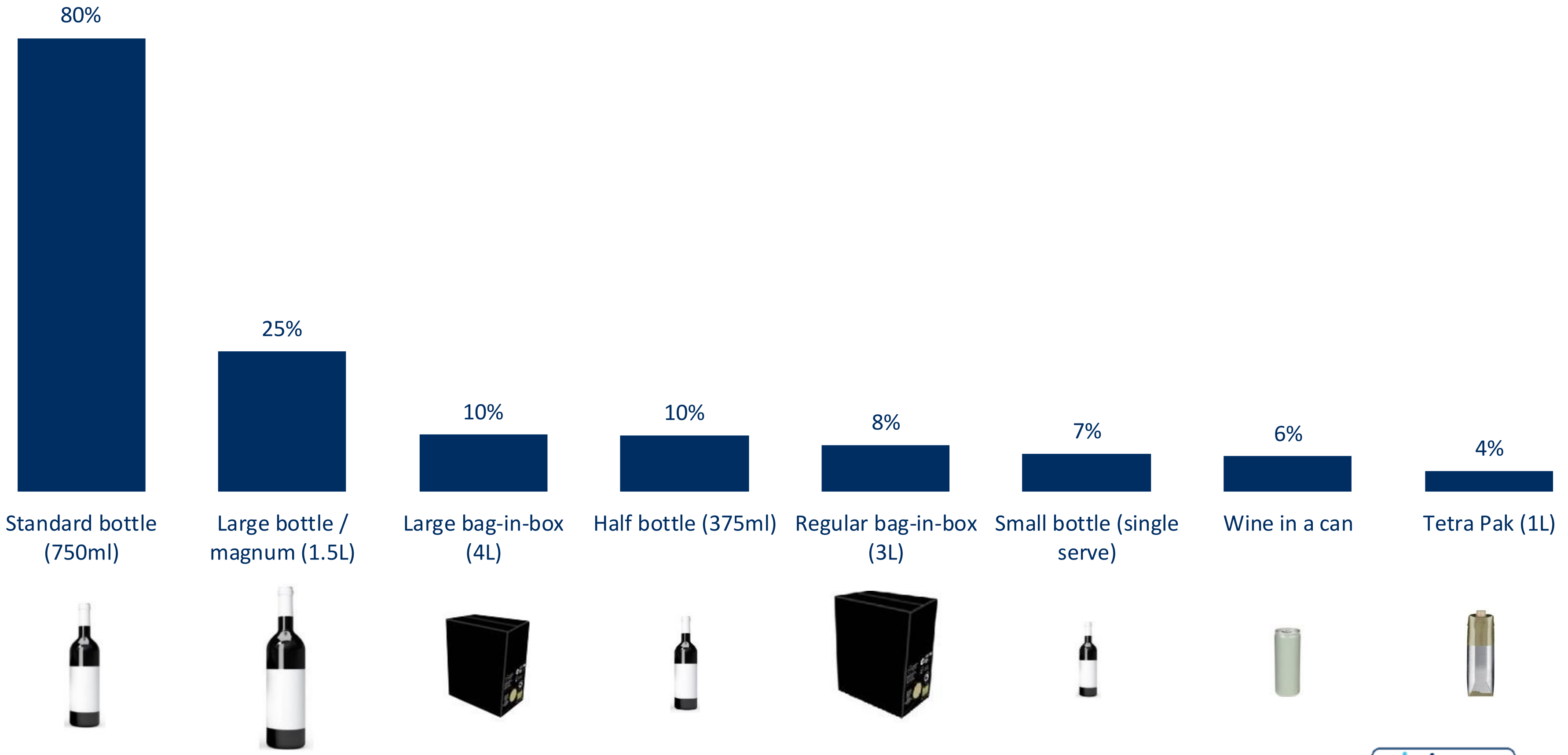
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING PURCHASE

Standard glass bottles (750ml) remain by far the dominant packaging type in the Canadian market; around 1 in 4 consumers say they have bought a large bottle / magnum, while purchases of other alternative packaging remains low

Packaging purchase

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING PURCHASE

Recalled purchase incidence for 3L bag-in-box has declined in both English-speaking and French-speaking Canada, suggesting that more volume is going through a narrower customer base

Packaging purchase: Tracking

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers (n=1,000)

		All Canadian regular wine drinkers			English-Speaking Canadian			Québécois		
Rank		2019	2020	Tracking	2019	2020	Tracking	2019	2020	Tracking
2020	*n=*	*1,000*	*1,000*	vs. '19	*746*	*750*	vs. '19	*254*	*250*	vs. '19
1	Standard bottle (750ml)	86%	80%	↓	85%	80%	↓	90%	80%	↓
2	Large bottle / magnum (1.5L)	25%	25%	→	29%	26%	→	15%	20%	→
3	Large bag-in-box (4L)	n/a	10%	n/a	n/a	10%	n/a	n/a	11%	n/a
4	Half bottle (375ml)	9%	10%	→	9%	10%	→	9%	10%	→
5	Regular bag-in-box (3L)	16%	8%	↓	18%	9%	↓	12%	7%	↓
6	Small bottle (single serve)	7%	7%	→	7%	7%	→	5%	7%	→
7	Wine in a can	6%	6%	→	6%	8%	→	3%	5%	→
8	Tetra Pak (1L)	4%	4%	→	4%	3%	→	4%	2%	→

WHAT DO MARKET EXPERTS SAY?

"Consumers are definitely more open to alternative packaging. We are starting to see more Tetra Pak, more can, as well as wine in pouches"

Wine Importer, Canada

Wine Intelligence Trade Interview Programme 2020
n/a : packaging type was not tested in this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'19 and Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING PURCHASE

Minimal differences in packaging purchase amongst language groups, except for wine in cans, with Québécois consumers purchasing this format less compared with all Canadian regular wine drinkers

Packaging purchase: By Language

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers (n=1,000)

Rank 2020		All Canadian regular wine drinkers	English-speaking Canadian	Québécois
	n=	*1,000*	*750*	*250*
1	Standard bottle (750ml)	80%	80%	80%
2	Large bottle / magnum (1.5L)	25%	26%	20%
3	Large bag-in-box (4L)	10%	10%	11%
4	Half bottle (375ml)	10%	10%	10%
5	Regular bag-in-box (3L)	8%	9%	7%
6	Small bottle (single serve)	7%	7%	7%
7	Wine in a can	6%	8%	2%
8	Tetra Pak (1L)	4%	3%	5%

Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING PURCHASE

In line with higher awareness amongst Engaged Explorers and Mainstream Matures, they are more likely to purchase alternative packaging types compared with other Canadian regular wine drinkers

Packaging purchase: By Portraits

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers (n=1,000)

			Portraits					
Rank 2020		All Canadian regular wine drinkers	Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
	n=	*1,000*	*95*	*107*	*152*	*218*	*106*	*321*
1	Standard bottle (750ml)	80%	87%	72%	91%	75%	82%	79%
2	Large bottle / magnum (1.5L)	25%	35%	30%	27%	20%	20%	23%
3	Large bag-in-box (4L)	10%	9%	13%	22%	5%	10%	7%
4	Half bottle (375ml)	10%	17%	20%	6%	15%	6%	4%
5	Regular bag-in-box (3L)	8%	10%	13%	14%	8%	9%	4%
6	Small bottle (single serve)	7%	13%	9%	2%	12%	5%	4%
7	Wine in a can	6%	13%	8%	5%	8%	6%	3%
8	Tetra Pak (1L)	4%	7%	10%	4%	2%	3%	2%

Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul’20, n=1,000 Canadian regular wine drinkers

PACKAGING PURCHASE

Despite generally lower awareness levels among younger drinkers, these consumers are more likely to purchase half bottles (375ml) and cans compared with other Canadian regular wine drinkers

Packaging purchase: By gender & age groups

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers (n=1,000)

Rank 2020		All Canadian regular wine drinkers	Gender: Male	Gender: Female	Age groups: 19-24 [Gen Z]	Age groups: 25-39 [Millennials]	Age groups: 40-54 [Gen X]	Age groups: 55+ [Boomers]
	n=	*1,000*	*507*	*493*	*67*	*316*	*251*	*366*
1	Standard bottle (750ml)	80%	79%	81%	68%	79%	83%	81%
2	Large bottle / magnum (1.5L)	25%	27%	23%	31%	23%	26%	25%
3	Large bag-in-box (4L)	10%	9%	12%	6%	5%	9%	16%
4	Half bottle (375ml)	10%	10%	10%	22%	13%	9%	6%
5	Regular bag-in-box (3L)	8%	8%	9%	9%	8%	7%	9%
6	Small bottle (single serve)	7%	7%	7%	12%	10%	5%	5%
7	Wine in a can	6%	4%	8%	12%	10%	5%	3%
8	Tetra Pak (1L)	4%	4%	3%	2%	5%	5%	2%

WHAT DO MARKET EXPERTS SAY?

"It is largely younger consumers purchasing cans for the convenience and the perceived greenness"

Wine Marketing Manager, Canada

Wine Intelligence Trade Interview Programme 2020
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING PURCHASE

Canadian consumers with high involvement in the wine category are more likely to purchase wine in large bottles / magnums (1.5L) compared with other drinkers in Canada

Packaging purchase: By wine involvement

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers (n=1,000)

Rank 2020		All Canadian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*232*	*398*	*370*
1	Standard bottle (750ml)	80%	77%	79%	83%
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3	Large bag-in-box (4L)	10%	7%	11%	11%
4	Half bottle (375ml)	10%	5%	12%	12%
5	Regular bag-in-box (3L)	8%	4%	8%	11%
6	Small bottle (single serve)	7%	3%	6%	9%
7	Wine in a can	6%	3%	7%	8%
8	Tetra Pak (1L)	4%	4%	2%	6%

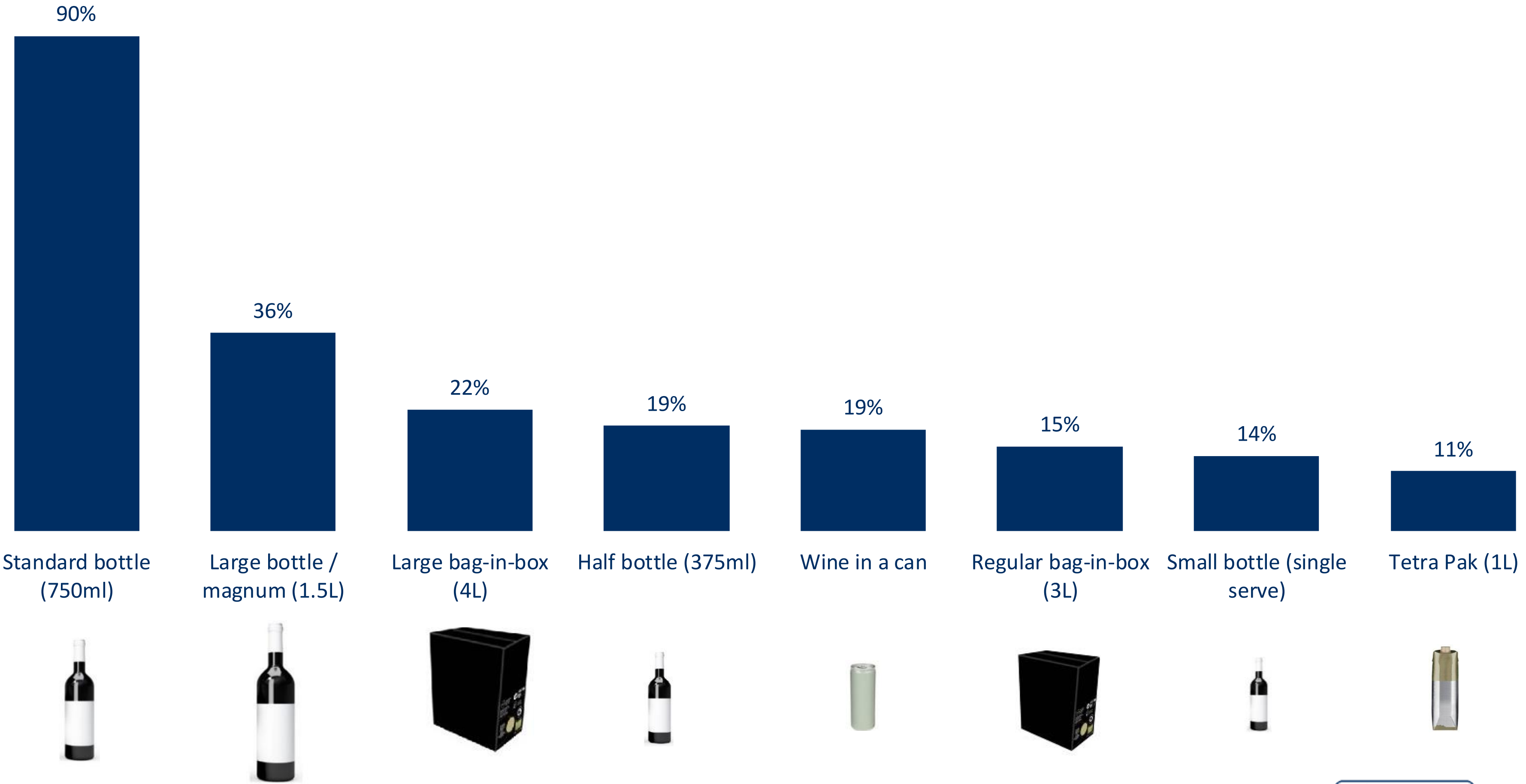
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONVERSION

Standard glass bottles (750ml) outperform all other packaging types in terms of converting those aware into purchases

Packaging conversion

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine



Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONVERSION

wine intelligence

Conversion rates have remained broadly stable over the past year, with the exception of a declining proportion of consumers purchasing standard bottles and regular bag-in-box (3L) which is also reflected by English-Speaking Canadian consumers

Packaging conversion: Tracking

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

		All Canadian regular wine drinkers			English-Speaking Canadian			Québécois		
Rank		2019	2020	Tracking	2019	2020	Tracking	2019	2020	Tracking
2020	*n=*	*1,000*	*1,000*	vs. '19	*746*	*750*	vs. '19	*254*	*250*	vs. '19
1	Standard bottle (750ml)	93%	90%	⬇	93%	89%	⬇	95%	92%	➡
2	Large bottle / magnum (1.5L)	34%	36%	➡	39%	38%	➡	21%	29%	➡
3	Large bag-in-box (4L)	n/a	22%	n/a	n/a	21%	n/a	n/a	24%	n/a
4	Half bottle (375ml)	18%	19%	➡	19%	21%	➡	15%	16%	➡
5	Wine in a can	19%	19%	➡	20%	20%	➡	14%	10%	➡
6	Regular bag-in-box (3L)	25%	15%	⬇	27%	16%	⬇	21%	15%	➡
7	Small bottle (single serve)	15%	14%	➡	17%	14%	➡	9%	14%	➡
8	Tetra Pak (1L)	11%	11%	➡	12%	10%	➡	10%	13%	➡

n/a : packaging type was not tested in this wave
⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'19 and Jul'20, n=1,000 Canadian regular wine drinkers

vinitrac

PACKAGING CONVERSION

No differences in terms of packaging conversion between English-speaking Canadians and Québécois, with standard bottles and larger formats positioning as the most purchased types of packaging

Packaging conversion: By Language

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	English-speaking Canadian	Québécois
	n=	*1,000*	*750*	*250*
1	Standard bottle (750ml)	90%	89%	92%
2	Large bottle / magnum (1.5L)	36%	38%	29%
3	Large bag-in-box (4L)	22%	21%	24%
4	Half bottle (375ml)	19%	21%	16%
5	Wine in a can	19%	20%	10%
6	Regular bag-in-box (3L)	15%	16%	15%
7	Small bottle (single serve)	14%	14%	14%
8	Tetra Pak (1L)	11%	10%	13%

Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONVERSION

Though based on a small sample size, the youngest and most frequent drinking group, Enthusiastic Treaters, are more likely to have purchases a variety of alternative packaging compared with all Canadian regular wine drinkers

Packaging conversion: By Portraits

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	Portraits: Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
	n=	1,000	95	107	152	218	106	321
1	Standard bottle (750ml)	90%	93%	89%	94%	90%	87%	88%
2	Large bottle / magnum (1.5L)	36%	45%	58%	34%	32%	28%	34%
3	Large bag-in-box (4L)	22%	16%	34%	35%	12%	25%	17%
4	Half bottle (375ml)	19%	24%	37%	11%	29%	12%	10%
5	Wine in a can	19%	26%	35%	13%	24%	14%	11%
6	Regular bag-in-box (3L)	15%	16%	36%	20%	16%	17%	7%
7	Small bottle (single serve)	14%	19%	24%	3%	24%	9%	9%
8	Tetra Pak (1L)	11%	16%	45%	7%	7%	11%	6%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul’20, n=1,000 Canadian regular wine drinkers

PACKAGING CONVERSION

Younger consumers in Canada are significantly more likely than others to purchase alternative packaging types for wine once they become aware of the alternative options available

wine intelligence

Packaging conversion: By gender & age groups

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

			Gender		Age groups			
Rank 2020		All Canadian regular wine drinkers	Male	Female	19-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*507*	*493*	*67*	*316*	*251*	*366*
1	Standard bottle (750ml)	90%	92%	88%	87%	93%	92%	87%
2	Large bottle / magnum (1.5L)	36%	40%	32%	57%	37%	39%	31%
3	Large bag-in-box (4L)	22%	19%	25%	18%	14%	20%	29%
4	Half bottle (375ml)	19%	19%	19%	45%	25%	18%	11%
5	Wine in a can	19%	15%	21%	43%	27%	15%	9%
6	Regular bag-in-box (3L)	15%	16%	15%	23%	19%	13%	14%
7	Small bottle (single serve)	14%	15%	13%	23%	20%	10%	9%
8	Tetra Pak (1L)	11%	13%	9%	12%	18%	14%	5%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONVERSION

Canadian consumers with high involvement in the wine category are more likely to purchase wine in large bottles / magnums (1.5 L) compared with other drinkers once they are aware of these formats

Packaging conversion: By wine involvement

% who have purchased each packaging type in the past 6 months
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	Wine involvement: Low involvement	Wine involvement: Medium involvement	Wine involvement: High involvement
	n=	*1,000*	*232*	*398*	*370*
1	Standard bottle (750ml)	90%	86%	88%	95%
2	Large bottle / magnum (1.5L)	36%	28%	32%	46%
3	Large bag-in-box (4L)	22%	16%	25%	23%
4	Half bottle (375ml)	19%	10%	21%	22%
5	Wine in a can	19%	10%	21%	21%
6	Regular bag-in-box (3L)	15%	8%	15%	21%
7	Small bottle (single serve)	14%	7%	13%	18%
8	Tetra Pak (1L)	11%	12%	5%	16%

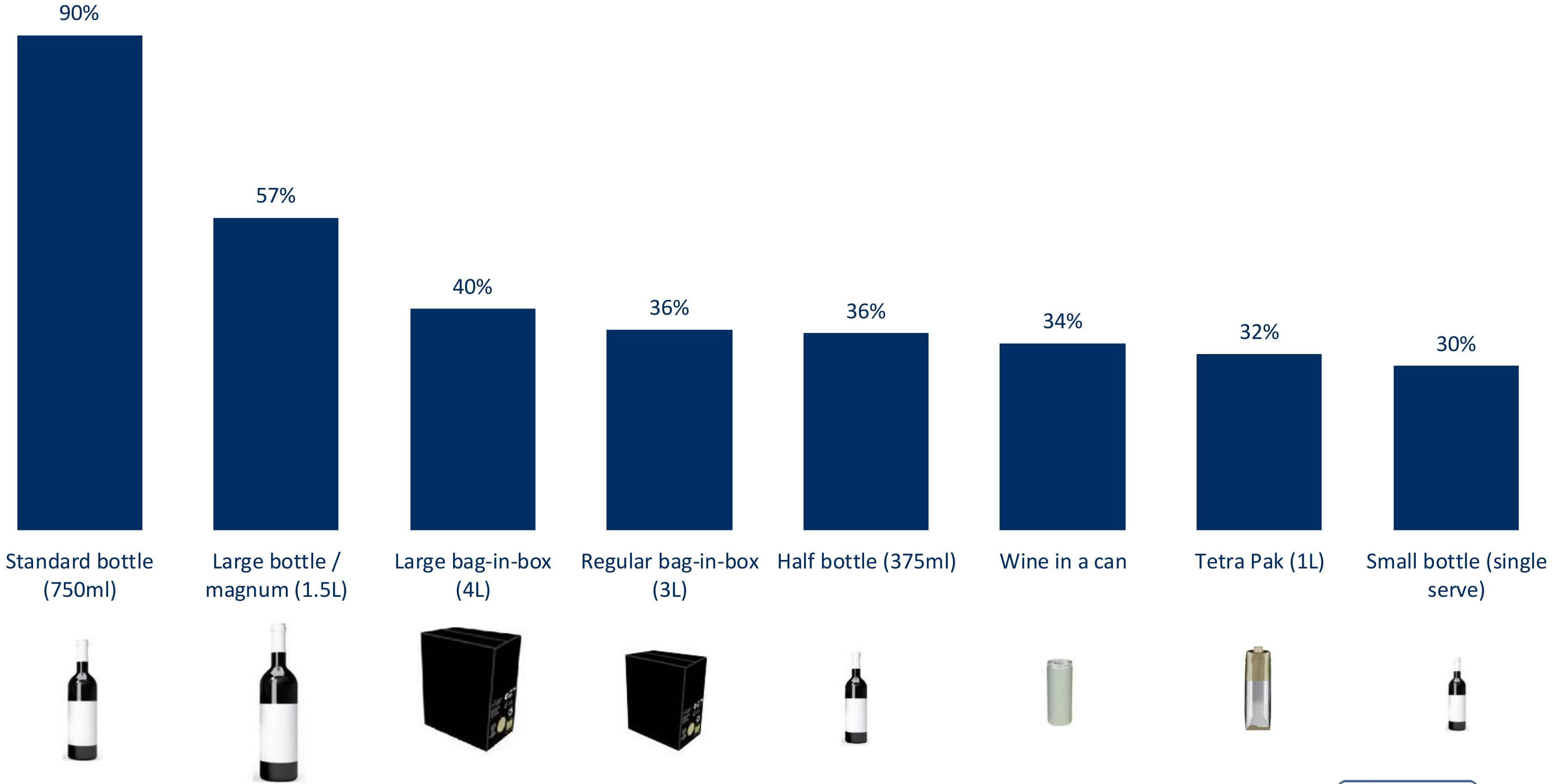
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONSIDERATION

Single serve formats (glass and cans) continue to have lower consideration rates, with standard bottles outperforming all other packaging types

Packaging consideration

% who would consider buying wine in the following types of packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine



Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONSIDERATION

The consideration rate for standard 75cl bottles and regular bag-in-box (3L) has decreased over the past year, whilst consideration of other packaging formats has remained stable

Packaging consideration: Tracking

% who would consider buying wine in the following types of packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

		All Canadian regular wine drinkers			English-Speaking Canadian			Québécois		
Rank		2019	2020	Tracking	2019	2020	Tracking	2019	2020	Tracking
2020	*n=*	*1,000*	*1,000*	vs. '19	*746*	*750*	vs. '19	*254*	*250*	vs. '19
1	Standard bottle (750ml)	93%	90%	↓	92%	90%	→	96%	90%	↓
2	Large bottle / magnum (1.5L)	57%	57%	→	65%	62%	→	34%	42%	→
3	Large bag-in-box (4L)	n/a	40%	n/a	n/a	42%	n/a	n/a	35%	n/a
4	Regular bag-in-box (3L)	44%	36%	↓	46%	39%	↓	34%	28%	→
5	Half bottle (375ml)	37%	36%	→	42%	41%	→	24%	24%	→
6	Wine in a can	39%	34%	→	42%	36%	→	31%	25%	→
7	Tetra Pak (1L)	32%	32%	→	36%	34%	→	20%	28%	→
8	Small bottle (single serve)	35%	30%	→	40%	34%	→	23%	19%	→

n/a : packaging type was not tested in this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'19 and Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONSIDERATION

Québécois consumers are more conservative in their future consideration, being less likely to consider purchasing alternative bottle sizes compared with all Canadian regular wine drinkers

Packaging consideration: By Language

% who would consider buying wine in the following types of packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	English-speaking Canadian	Québécois
	n=	*1,000*	*750*	*250*
1	Standard bottle (750ml)	90%	90%	90%
2	Large bottle / magnum (1.5L)	57%	62%	42%
3	Large bag-in-box (4L)	40%	42%	35%
4	Regular bag-in-box (3L)	36%	39%	28%
5	Half bottle (375ml)	36%	41%	24%
6	Wine in a can	34%	36%	25%
7	Tetra Pak (1L)	32%	34%	28%
8	Small bottle (single serve)	30%	34%	19%

Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONSIDERATION

Minimal differences between Portraits segments, except for Kitchen Casuals who are less likely to consider purchasing alternative bottle sizes (magnums and half bottles) in the future, reflecting their preference for familiarity

Packaging consideration: By Portraits

% who would consider buying wine in the following types of packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	Portraits: Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
	n=	1,000	95	107	152	218	106	321
1	Standard bottle (750ml)	90%	92%	87%	91%	88%	89%	91%
2	Large bottle / magnum (1.5L)	57%	66%	69%	58%	52%	46%	56%
3	Large bag-in-box (4L)	40%	43%	54%	43%	43%	46%	30%
4	Regular bag-in-box (3L)	36%	42%	51%	37%	37%	40%	30%
5	Half bottle (375ml)	36%	43%	42%	27%	46%	39%	27%
6	Wine in a can	34%	41%	42%	33%	37%	34%	26%
7	Tetra Pak (1L)	32%	40%	44%	34%	37%	28%	24%
8	Small bottle (single serve)	30%	42%	36%	23%	39%	21%	24%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONSIDERATION

In line with purchase patterns, younger consumers are more likely to consider purchasing half bottles and wine in cans, potentially reflecting the suitability of the formats for more social occasions

Packaging consideration: By gender & age groups

% who would consider buying wine in the following types of packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

			Gender		Age groups			
Rank 2020		All Canadian regular wine drinkers	Male	Female	19-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	1,000	507	493	67	316	251	366
1	Standard bottle (750ml)	90%	90%	89%	85%	89%	94%	89%
2	Large bottle / magnum (1.5L)	57%	58%	56%	64%	62%	60%	50%
3	Large bag-in-box (4L)	40%	37%	43%	60%	45%	30%	41%
4	Regular bag-in-box (3L)	36%	38%	35%	55%	45%	33%	32%
5	Half bottle (375ml)	36%	34%	38%	54%	47%	34%	25%
6	Wine in a can	34%	30%	37%	42%	45%	33%	22%
7	Tetra Pak (1L)	32%	30%	34%	44%	38%	28%	30%
8	Small bottle (single serve)	30%	27%	32%	42%	38%	27%	24%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING CONSIDERATION

Reflecting their purchasing behaviour, higher involved consumers are more likely to consider purchasing large bottles / magnums (1.5L) in the future

Packaging consideration: By wine involvement

% who would consider buying wine in the following types of packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*232*	*398*	*370*
1	Standard bottle (750ml)	90%	90%	90%	90%
2	Large bottle / magnum (1.5L)	57%	53%	52%	65%
3	Large bag-in-box (4L)	40%	30%	39%	47%
4	Regular bag-in-box (3L)	36%	34%	32%	43%
5	Half bottle (375ml)	36%	30%	33%	42%
6	Wine in a can	34%	32%	30%	39%
7	Tetra Pak (1L)	32%	33%	29%	34%
8	Small bottle (single serve)	30%	23%	28%	36%

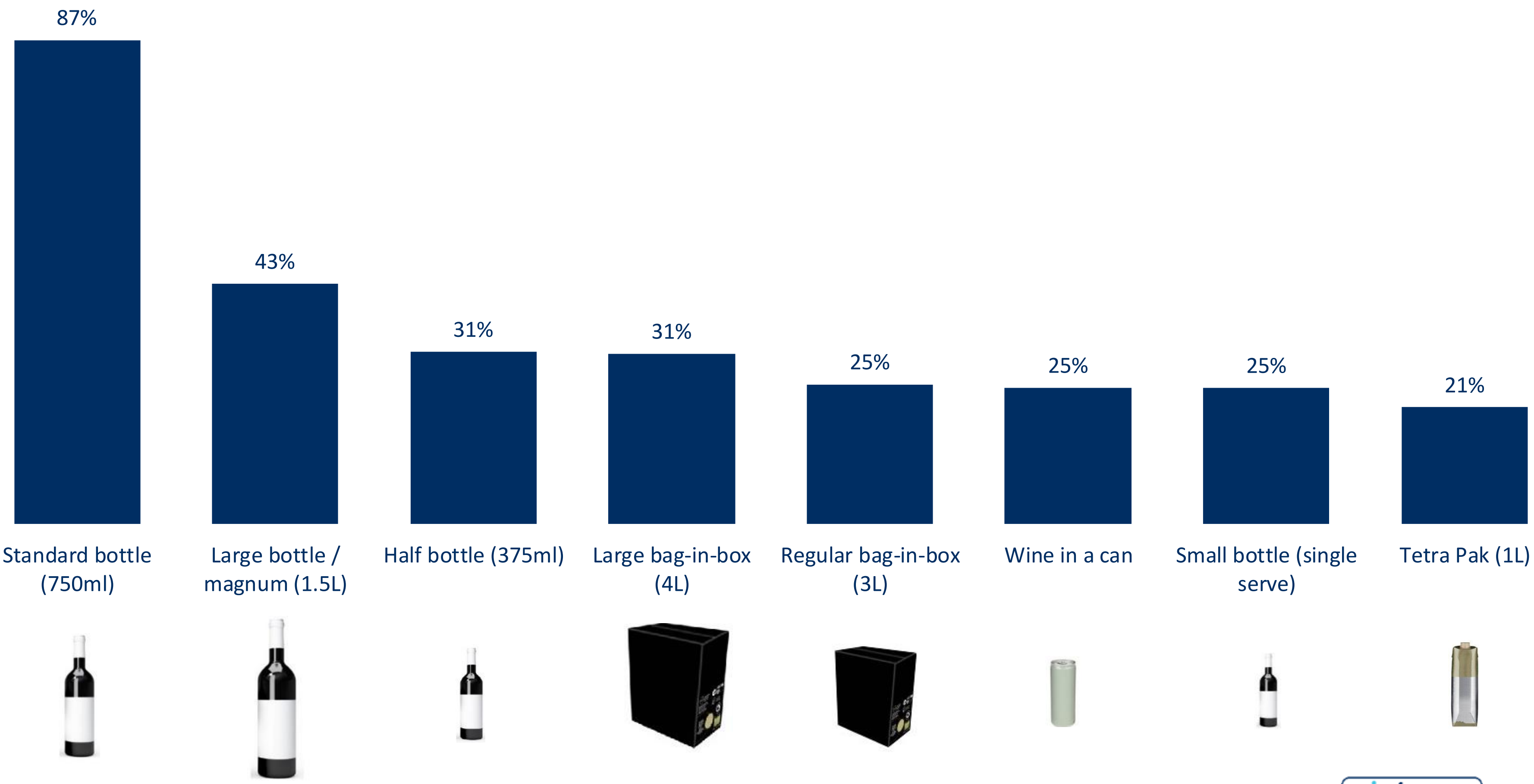
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AFFINITY

Standard bottles (750ml) and large bottles outperform the rest of packaging types in terms of affinity

Packaging affinity

% who feel that the following packaging types are right for people like them
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine



Source: Wine Intelligence, Vinitrac® Canada, Jul’20, n=1,000 Canadian regular wine drinkers

PACKAGING AFFINITY

Reflecting decreasing purchase rates, a significantly lower proportion of consumers feel an affinity for standard bottles and regular bag-in-box (3L)

Packaging affinity: Tracking

% who feel that the following packaging types are right for people like them
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

		All Canadian regular wine drinkers			English-Speaking Canadian			Québécois		
Rank		2019	2020	Tracking	2019	2020	Tracking	2019	2020	Tracking
2020	*n=*	*1,000*	*1,000*	vs. '19	*746*	*750*	vs. '19	*254*	*250*	vs. '19
1	Standard bottle (750ml)	91%	87%	↓	89%	87%	→	94%	87%	↓
2	Large bottle / magnum (1.5L)	41%	43%	→	47%	48%	→	22%	31%	→
3	Half bottle (375ml)	31%	31%	→	36%	33%	→	20%	27%	→
4	Large bag-in-box (4L)	n/a	31%	n/a	n/a	31%	n/a	n/a	29%	n/a
5	Regular bag-in-box (3L)	31%	25%	↓	33%	26%	↓	27%	20%	→
6	Wine in a can	26%	25%	→	27%	26%	→	19%	20%	→
7	Small bottle (single serve)	26%	25%	→	29%	27%	→	18%	17%	→
8	Tetra Pak (1L)	21%	21%	→	23%	22%	→	14%	18%	→

n/a : packaging type was not tested in this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'19 and Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AFFINITY

No differences for affinity among English-speaking Canadians and Québécois consumers, apart from Québécois consumers having less affinity for large bottles

Packaging affinity: By Language

% who feel that the following packaging types are right for people like them
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	English-speaking Canadian	Québécois
	n=	*1,000*	*750*	*250*
1	Standard bottle (750ml)	87%	87%	87%
2	Large bottle / magnum (1.5L)	43%	48%	31%
3	Half bottle (375ml)	31%	33%	27%
4	Large bag-in-box (4L)	31%	31%	29%
5	Regular bag-in-box (3L)	25%	26%	20%
6	Wine in a can	25%	26%	20%
7	Small bottle (single serve)	25%	27%	17%
8	Tetra Pak (1L)	21%	22%	18%

Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AFFINITY

Unsurprisingly, Generation Treaters are more likely to feel affinity for a range of alternative wine packaging types compared with all Canadian regular wine drinkers

Packaging affinity: By Portraits

% who feel that the following packaging types are right for people like them
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	Portraits: Engaged Explorers	Enthusiastic Treaters	Mainstream Matures	Social Newbies	Contented Occasionals	Kitchen Casuals
	n=	*1,000*	*95*	*107*	*152*	*218*	*106*	*321*
1	Standard bottle (750ml)	87%	89%	81%	91%	86%	83%	89%
2	Large bottle / magnum (1.5L)	43%	49%	64%	44%	38%	42%	39%
3	Half bottle (375ml)	31%	39%	32%	27%	46%	33%	18%
4	Large bag-in-box (4L)	31%	24%	51%	37%	25%	39%	24%
5	Regular bag-in-box (3L)	25%	22%	45%	33%	21%	25%	20%
6	Wine in a can	25%	20%	23%	21%	31%	35%	19%
7	Small bottle (single serve)	25%	32%	31%	16%	35%	21%	19%
8	Tetra Pak (1L)	21%	18%	51%	22%	9%	24%	21%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AFFINITY

Millennials in Canada are more likely to feel affinity for smaller wine formats (bottle and can) compared with other Canadian consumers

Packaging affinity: By gender & age groups

% who feel that the following packaging types are right for people like them
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	Gender: Male	Gender: Female	Age groups: 19-24 [Gen Z]	Age groups: 25-39 [Millennials]	Age groups: 40-54 [Gen X]	Age groups: 55+ [Boomers]
	n=	*1,000*	*507*	*493*	*67*	*316*	*251*	*366*
1	Standard bottle (750ml)	87%	89%	85%	82%	87%	91%	86%
2	Large bottle / magnum (1.5L)	43%	46%	41%	51%	45%	46%	39%
3	Half bottle (375ml)	31%	29%	33%	47%	35%	32%	25%
4	Large bag-in-box (4L)	31%	30%	31%	40%	31%	21%	36%
5	Regular bag-in-box (3L)	25%	27%	24%	29%	29%	21%	25%
6	Wine in a can	25%	19%	29%	43%	36%	18%	15%
7	Small bottle (single serve)	25%	22%	27%	35%	33%	23%	17%
8	Tetra Pak (1L)	21%	19%	23%	33%	26%	19%	18%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PACKAGING AFFINITY

Higher involved consumers have more affinity towards large bottles / magnums (1.5L) compared with other Canadian regular wine drinkers

Packaging affinity: By wine involvement

% who feel that the following packaging types are right for people like them
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		All Canadian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*232*	*398*	*370*
1	Standard bottle (750ml)	87%	86%	86%	89%
2	Large bottle / magnum (1.5L)	43%	36%	40%	52%
3	Half bottle (375ml)	31%	27%	29%	36%
4	Large bag-in-box (4L)	31%	26%	33%	31%
5	Regular bag-in-box (3L)	25%	19%	26%	28%
6	Wine in a can	25%	27%	26%	22%
7	Small bottle (single serve)	25%	22%	24%	27%
8	Tetra Pak (1L)	21%	23%	21%	20%

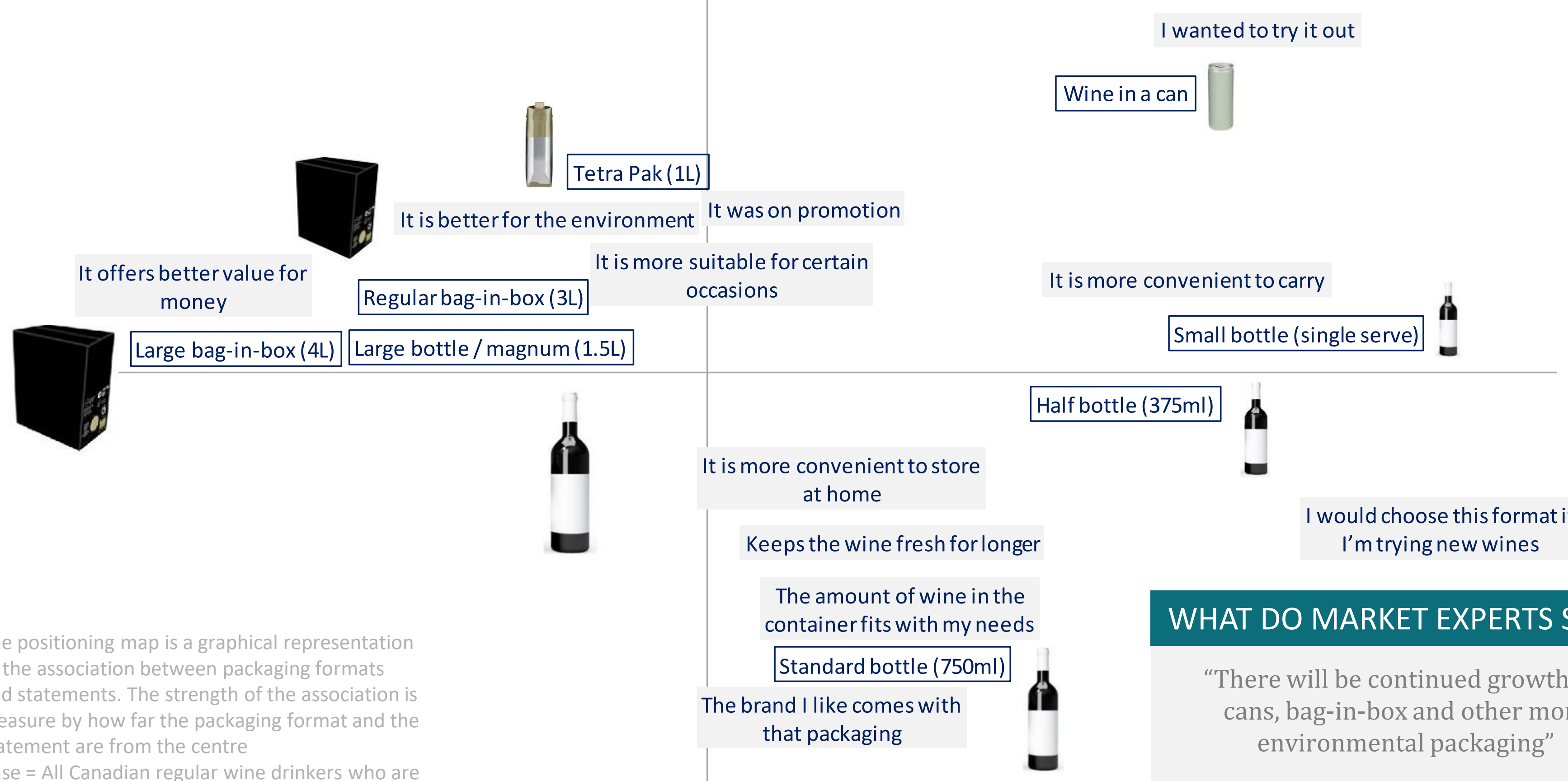
Red / Blue: Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul’20, n=1,000 Canadian regular wine drinkers

CONTENTS

DRIVERS OF PACKAGING FORMAT PURCHASE

Bag-in-box and Tetra-paks are seen as delivering better value for money and are associated with a positive environmental benefit whereas smaller formats such as canned wine are more associated with trial

Drivers of packaging format purchase: Imagery perception map



WHAT DO MARKET EXPERTS SAY?

"A thread we are seeing throughout this whole alternative packaging is definitely sustainability"

Wine Importer, Canada

WHAT DO MARKET EXPERTS SAY?

"There will be continued growth for cans, bag-in-box and other more environmental packaging"

Wine Marketing Manager, Canada

The positioning map is a graphical representation of the association between packaging formats and statements. The strength of the association is measure by how far the packaging format and the statement are from the centre

Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Wine Intelligence Trade Interview Programme 2020

Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

DRIVERS OF PACKAGING FORMAT PURCHASE

Magnums are strongly associated with specific occasions and wine in cans leads for trial and novelty

Top 3 associations for each alternative packaging format

Drivers of packaging format purchase

% who consider the following reasons to purchase wine in the following packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

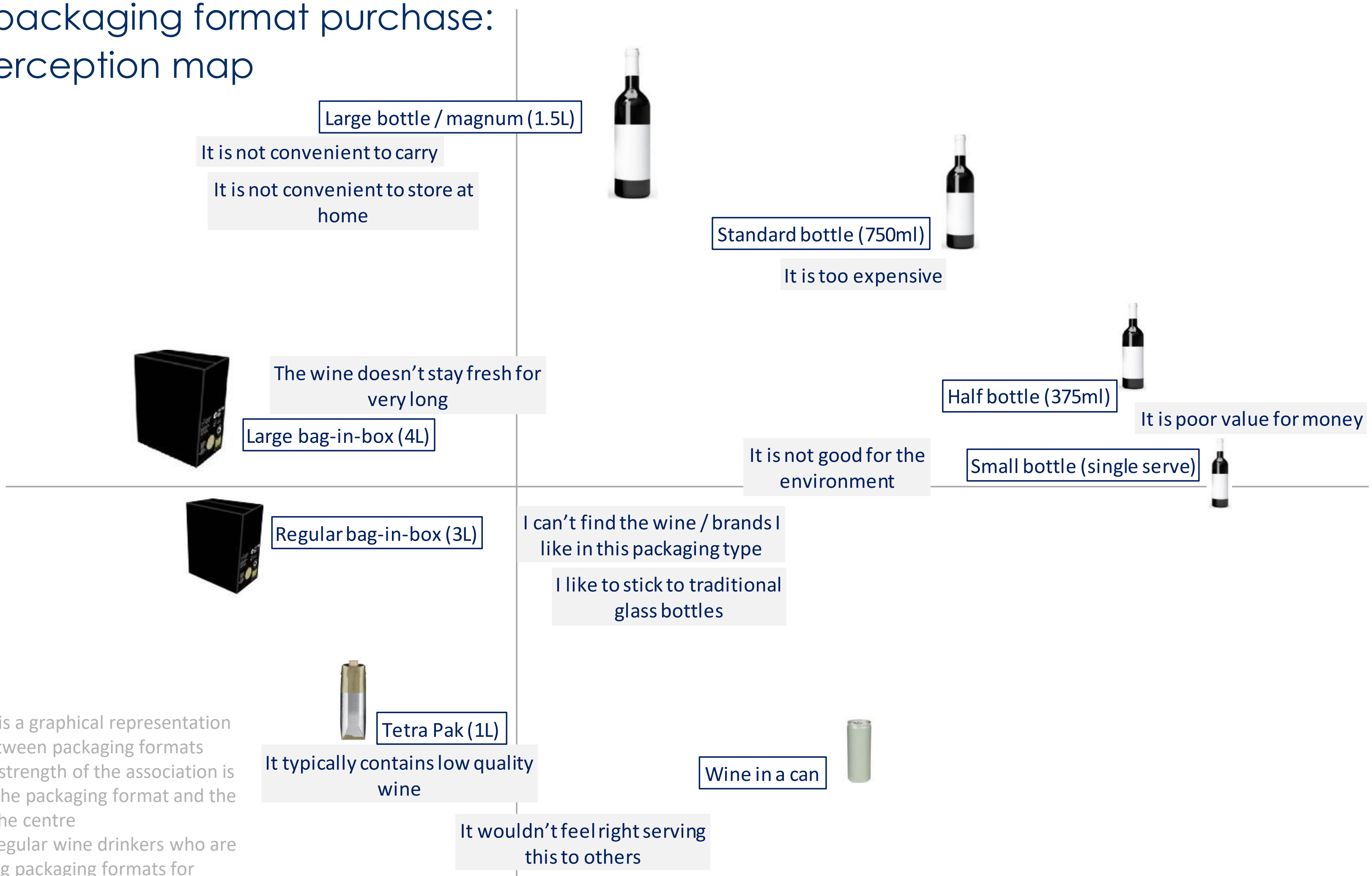
	Standard bottle (750ml)	Large bottle / magnum (1.5L)	Half bottle (375ml)	Small bottle (single serve)	Large bag-in-box (4L)	Regular bag-in-box (3L)	Tetra Pak (1L)	Wine in a can
It offers better value for money	27%	36%	11%	8%	37%	34%	16%	10%
It is more suitable for certain occasions	30%	31%	19%	17%	21%	23%	16%	21%
The amount of wine in the container fits with my needs	44%	23%	22%	19%	19%	17%	10%	16%
It was on promotion	28%	26%	19%	17%	21%	20%	18%	19%
I wanted to try it out	17%	9%	22%	23%	8%	10%	12%	29%
It is more convenient to carry	28%	8%	18%	19%	11%	9%	11%	24%
It is more convenient to store at home	35%	10%	15%	12%	18%	13%	12%	14%
The brand I like comes with that packaging	35%	16%	13%	10%	11%	10%	7%	8%
I would choose this format if I'm trying new wines	27%	5%	22%	24%	3%	4%	4%	15%
Keeps the wine fresh for longer	24%	8%	15%	10%	12%	12%	8%	7%
It is better for the environment	14%	12%	8%	5%	15%	13%	11%	9%
I don't know	5%	11%	14%	12%	12%	14%	16%	11%

Orange / red: Statistically significantly higher than 6 / 7 packaging types in the competitive set at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

BARRIERS TO PACKAGING FORMAT PURCHASE

Smaller format bottles seen as delivering comparatively poor value for money, whilst wine in cans and Tetra-paks are perceived as offering lower quality wine

Barriers to packaging format purchase: Imagery perception map



The positioning map is a graphical representation of the association between packaging formats and statements. The strength of the association is measure by how far the packaging format and the statement are from the centre

Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

BARRIERS TO PACKAGING FORMAT PURCHASE

The main barrier to purchasing alternative packaging formats is the underlying preference for standard glass bottles; with the perception that smaller format bottles are poorer value for money, whilst bag-in-box has the perception of containing lower quality wine

Top 3 associations for each alternative packaging format

Barriers to packaging format purchase

% who consider the following reasons to be barriers to purchase the following packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

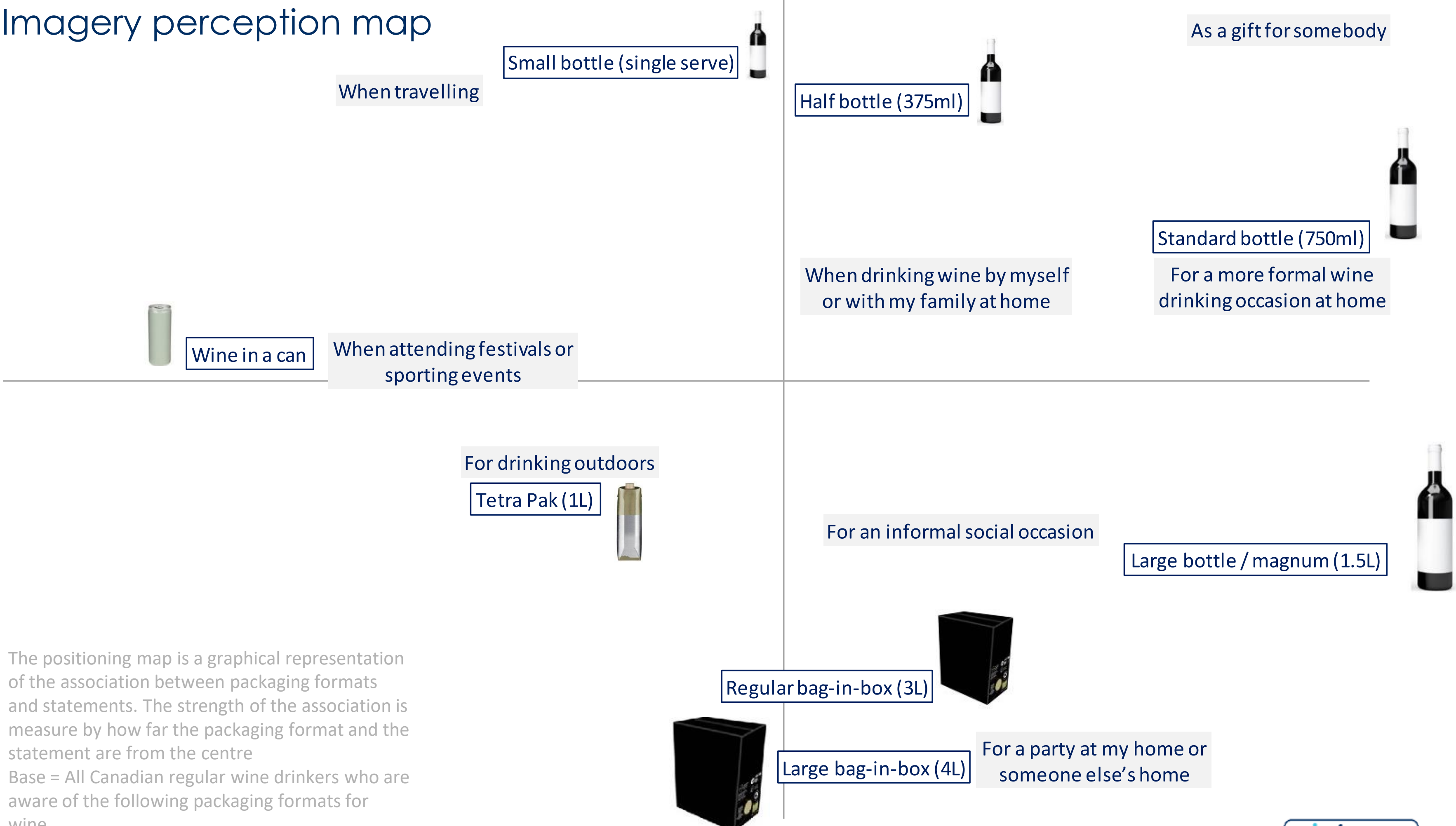
	Standard bottle (750ml)	Large bottle / magnum (1.5L)	Half bottle (375ml)	Small bottle (single serve)	Large bag-in-box (4L)	Regular bag-in-box (3L)	Tetra Pak (1L)	Wine in a can
I like to stick to traditional glass bottles	16%	14%	16%	14%	24%	26%	24%	31%
I can't find the wine / brands I like in this packaging type	6%	14%	12%	13%	18%	20%	17%	16%
It is poor value for money	16%	5%	23%	28%	7%	6%	6%	18%
It is too expensive	14%	17%	14%	19%	13%	11%	9%	11%
It wouldn't feel right serving this to others	5%	5%	7%	10%	18%	21%	21%	22%
It typically contains low quality wine	4%	6%	4%	5%	24%	24%	21%	21%
It is not convenient to store at home	10%	19%	4%	4%	23%	20%	9%	3%
The wine doesn't stay fresh for very long	11%	14%	4%	3%	20%	16%	12%	10%
It is not convenient to carry	8%	17%	3%	4%	20%	16%	6%	3%
It is not good for the environment	7%	4%	5%	9%	6%	6%	7%	9%
I don't know	13%	14%	16%	14%	9%	9%	12%	12%

Orange / red: Statistically significantly higher than 6 / 7 packaging types in the competitive set at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

OCCASIONS FOR PACKAGING FORMAT PURCHASE

Clear distinction between wine packaging formats for different wine occasions, with large bottles / magnums (1.5L) and bag-in-box showing salience for social occasions and cans and Tetra-pack strongly associated with outdoor events

Occasions for packaging format purchase: Imagery perception map



The positioning map is a graphical representation of the association between packaging formats and statements. The strength of the association is measure by how far the packaging format and the statement are from the centre

Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

OCCASIONS FOR PACKAGING FORMAT PURCHASE

Canadian regular wine drinkers continue to be more inclined to purchase standard glass bottles for more formal and gift occasions, whereas cans are more suited for outdoor events and when travelling

Top 3 associations for each alternative packaging format

Occasions for packaging format purchase

% who consider the following occasions for purchasing wine in the following packaging formats
Base = All Canadian regular wine drinkers who are aware of the following packaging formats for wine

	Standard bottle (750ml)	Large bottle / magnum (1.5L)	Half bottle (375ml)	Small bottle (single serve)	Large bag-in-box (4L)	Regular bag-in-box (3L)	Tetra Pak (1L)	Wine in a can
When drinking wine by myself or with my family at home	56%	27%	30%	31%	23%	23%	16%	23%
For a party at my home or someone else's home	52%	48%	12%	11%	34%	29%	18%	19%
For drinking outdoors	30%	15%	18%	19%	20%	21%	21%	42%
For an informal social occasion	46%	26%	18%	12%	22%	21%	17%	23%
As a gift for somebody	64%	25%	23%	14%	6%	6%	5%	6%
When travelling	19%	8%	17%	26%	6%	9%	16%	31%
For a more formal wine drinking occasion at home	52%	25%	13%	7%	9%	8%	6%	6%
When attending festivals or sporting events	13%	8%	11%	14%	10%	9%	12%	29%
I would not consider buying this format for any of these occasions	2%	10%	20%	24%	27%	28%	29%	22%

Orange / red: Statistically significantly higher than 6 / 7 packaging types in the competitive set at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

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PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

Standard glass bottle purchases have been boosted mainly by transfer of volume from on-premise; bag in box and canned wine purchase recall is also increasing

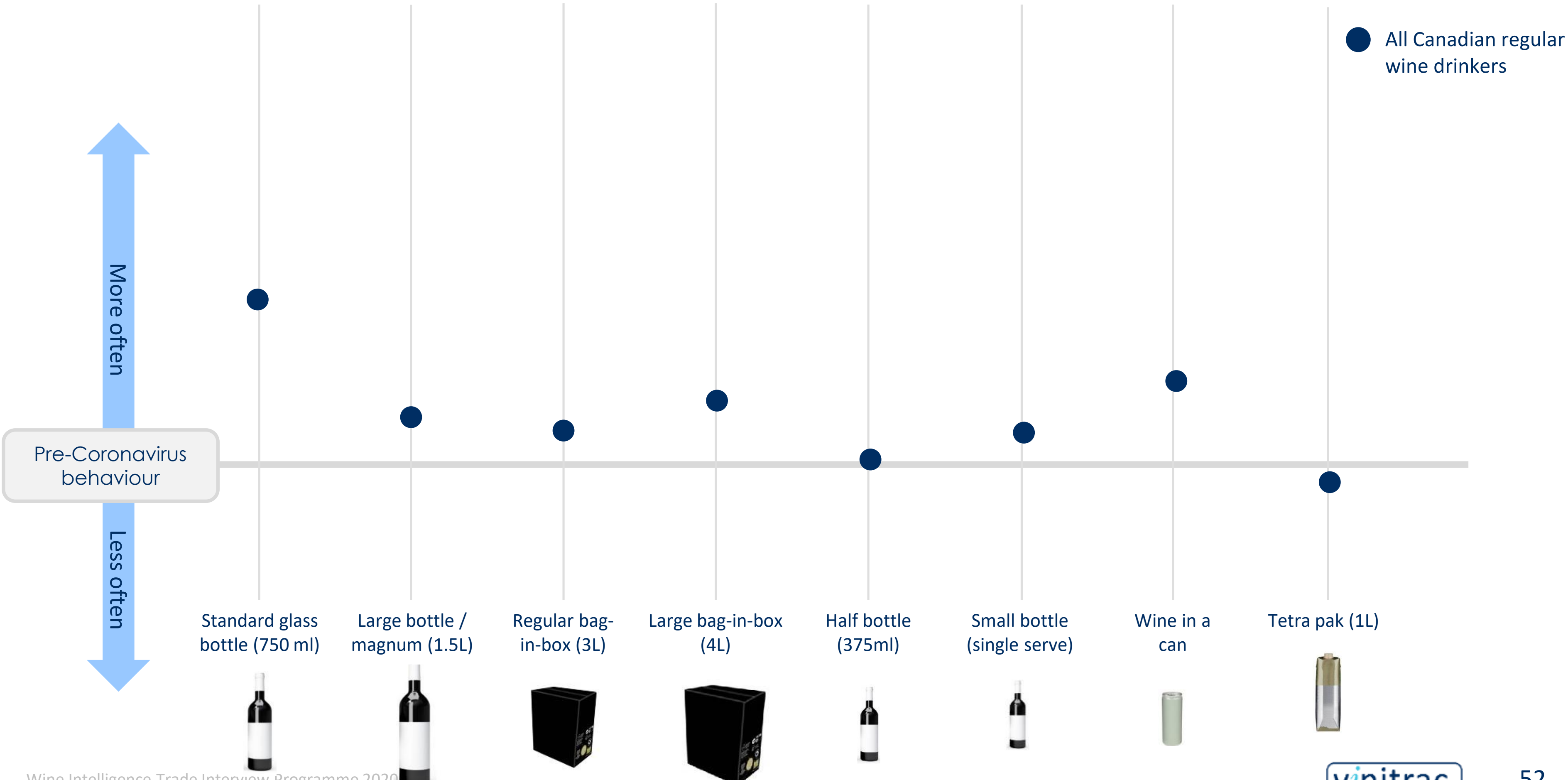
WHAT DO MARKET EXPERTS SAY?

"Covid hit and bag-in-box started booming. Consumers overall are consuming more, and they want to stack up."

Wine Importer, Canada

Packaging purchase frequency past 2 months

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Canadian regular wine drinkers (n=1,000)



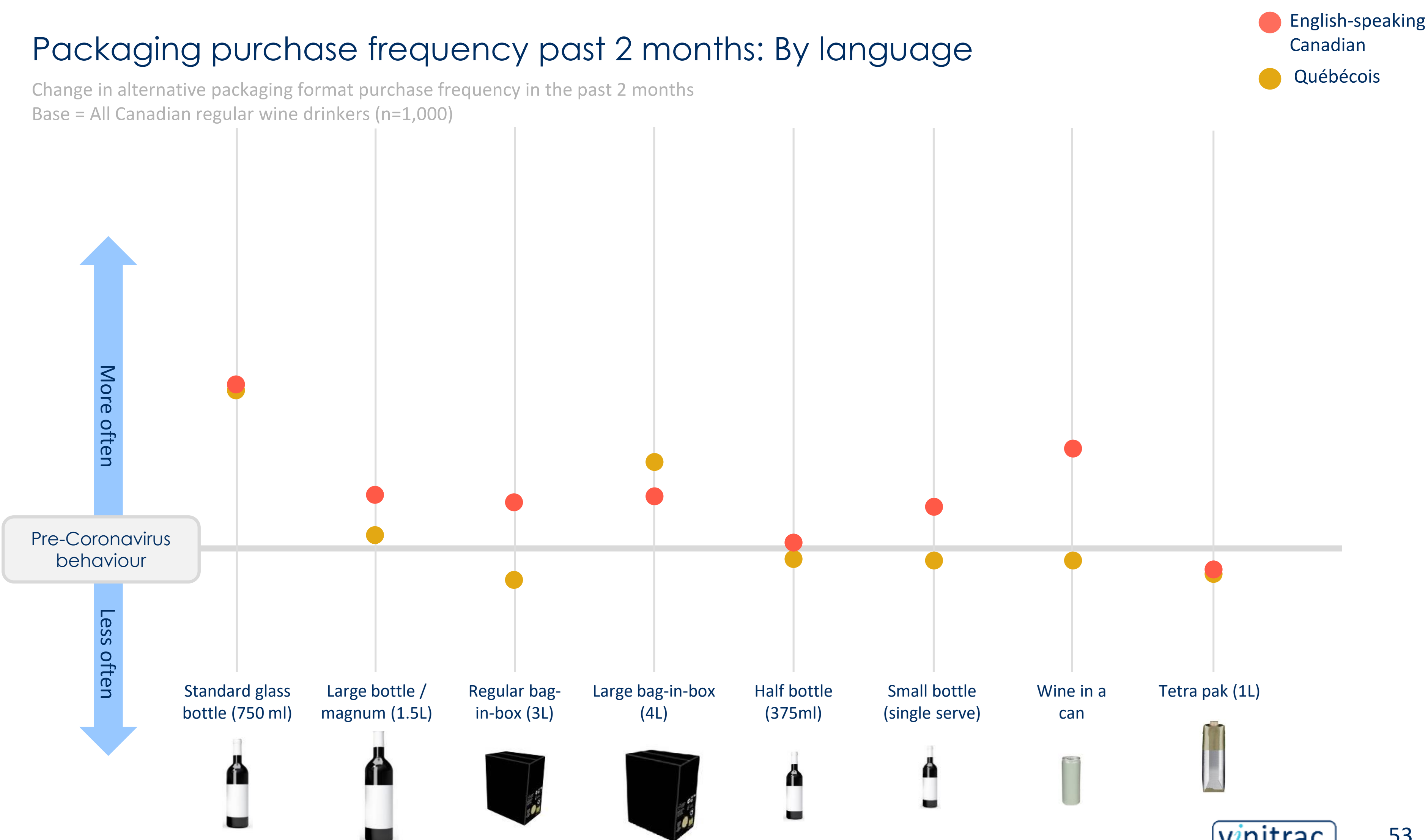
Wine Intelligence Trade Interview Programme 2020
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

English-speaking Canadian consumers were driving the increase in purchase of wine in cans during June and July 2020

Packaging purchase frequency past 2 months: By language

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Canadian regular wine drinkers (n=1,000)



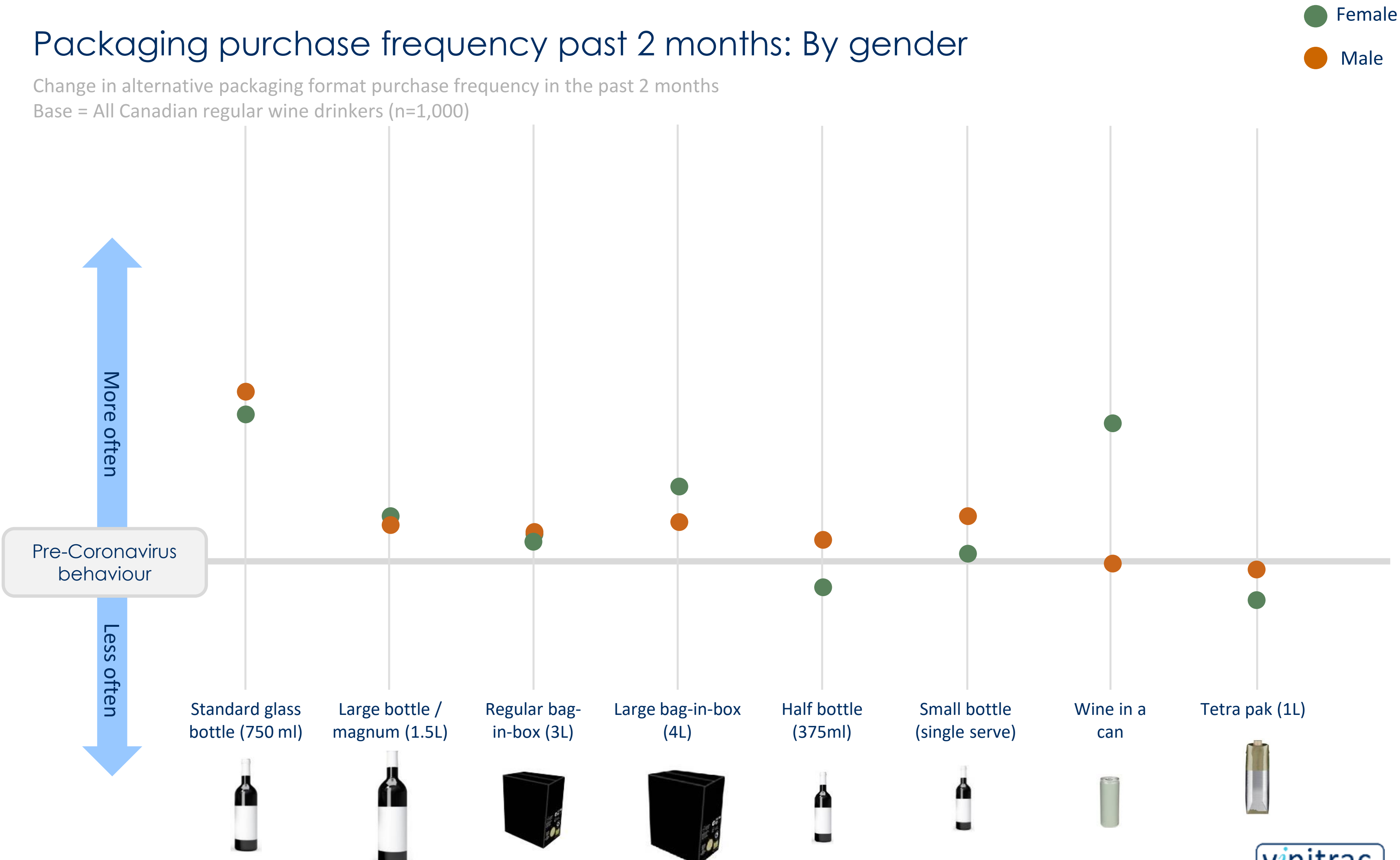
Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

Women in particular were purchasing wine in cans more frequently than they did pre-pandemic

Packaging purchase frequency past 2 months: By gender

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Canadian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Canada, Jul'20, n=1,000 Canadian regular wine drinkers

PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

Millennials were increasingly likely to purchase the majority of alternative wine formats during June and July 2020

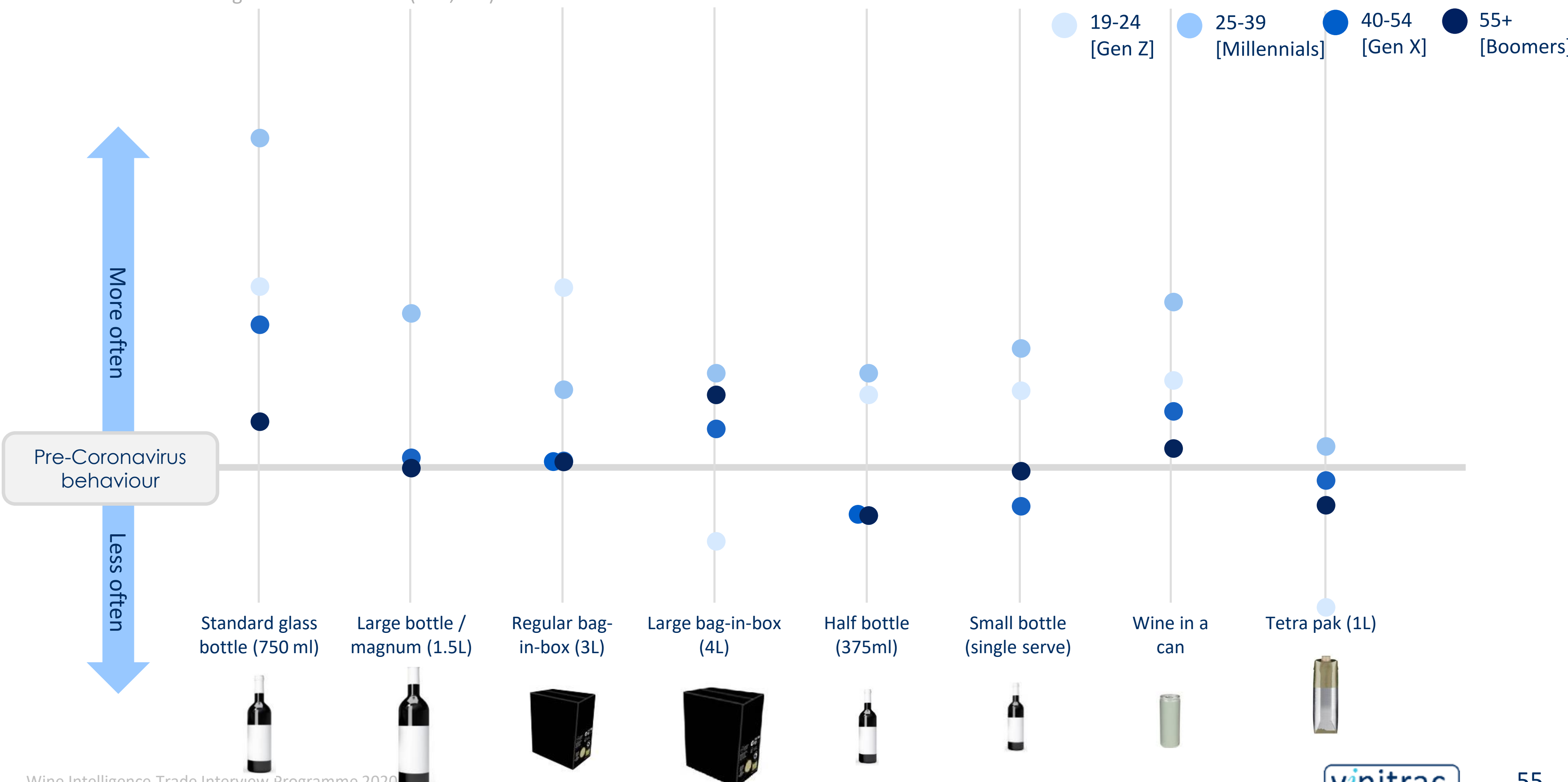
WHAT DO MARKET EXPERTS SAY?

"Sharing now is not a thing so cans are increasing because those who go out and socialize don't want to share anymore"

Wine Importer, Canada

Packaging purchase frequency past 2 months: By age groups

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Canadian regular wine drinkers (n=1,000)

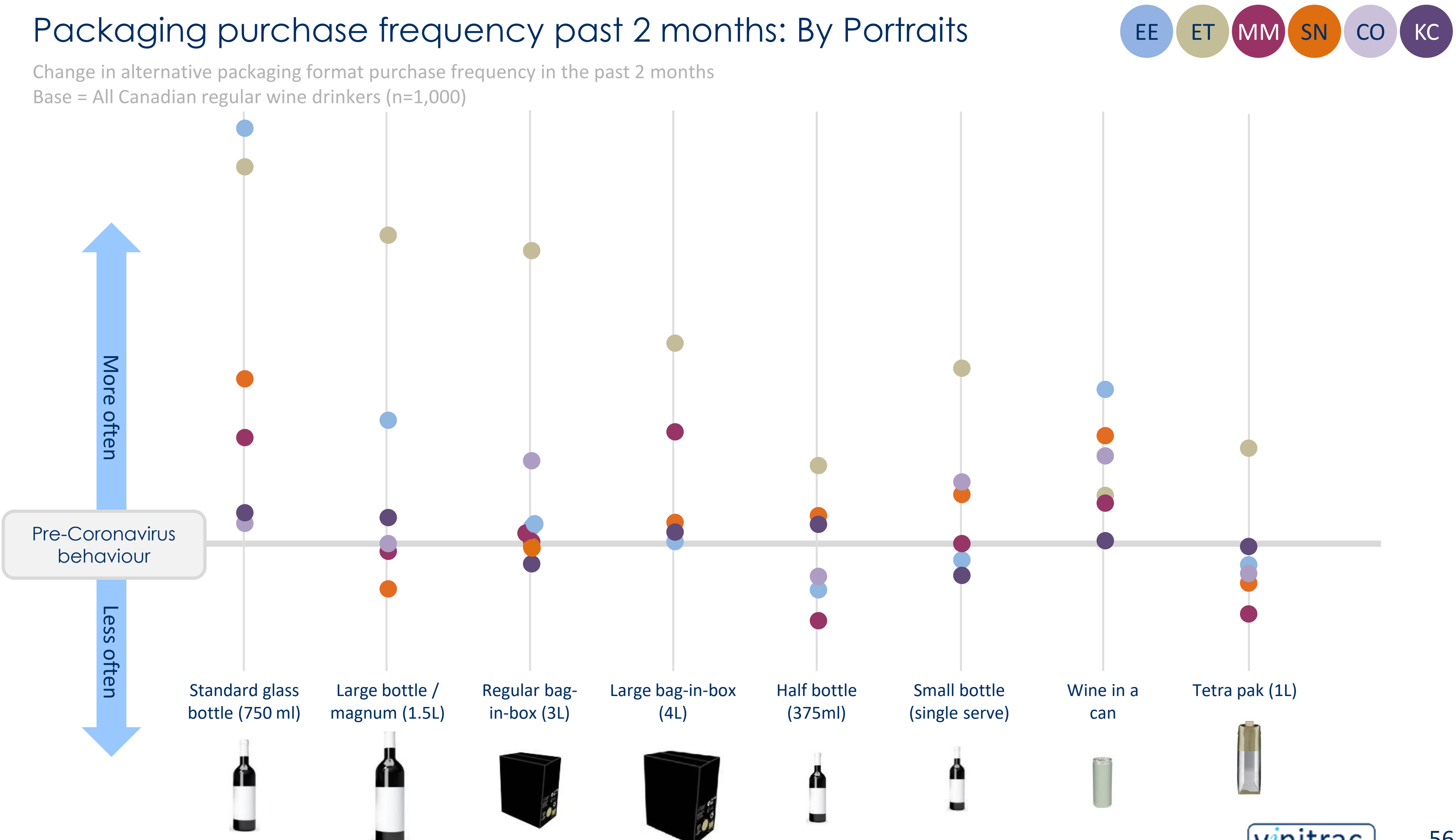


PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

Enthusiastic Treaters, the youngest segment with strong interest in the category, were more likely than other Portraits to purchase all wine packaging types during June and July 2020, with the exception of wine in cans

Packaging purchase frequency past 2 months: By Portraits

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Canadian regular wine drinkers (n=1,000)



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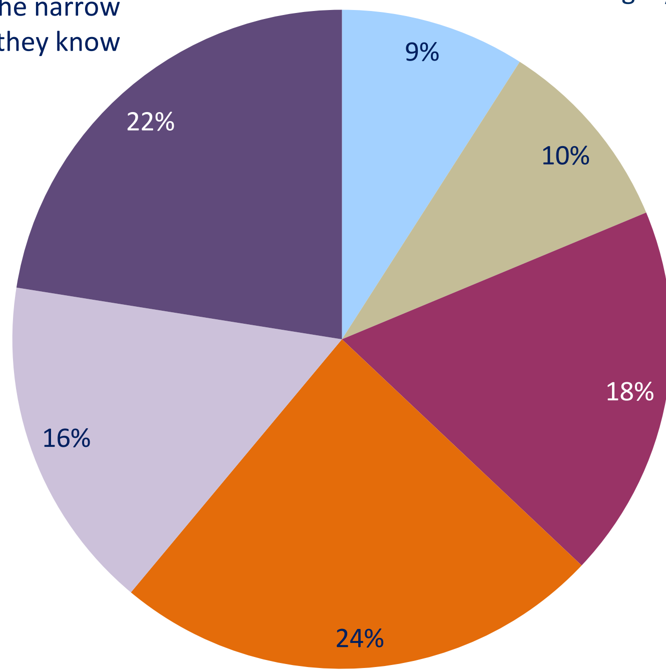
CANADA PORTRAITS SEGMENTATION

% Share of Canadian regular wine drinkers by Portraits segments

Engaged Explorers: younger and mid-aged, confident wine drinkers who enjoy discovering new wine. Wine is important to their lifestyles so they are willing to invest time and money in the category

Kitchen Casuals: infrequent, mid-aged to older wine drinkers who show little interest in the wine category and tend to stick to the narrow range of wines that they know



Enthusiastic Treaters: the youngest and most frequent wine drinking group, they have a strong interest in the category, yet lack some confidence in their own wine knowledge

Senior Bargain Hunters: the least frequent wine drinkers and an older segment, with fairly low wine knowledge and little interest in learning more. They are likely to stick to the brands and styles of wine they know and trust

Mainstream Matures: the oldest segment, they are frequent wine drinkers who enjoy drinking wine at home in the evening, and who through their experience in the category, feel competent in their wine knowledge

Social Newbies: younger wine drinkers, who drink wine fairly infrequently, but who enjoy wine in social settings out with friends, relying heavily on recommendations

Source: Wine Intelligence, Vinitrac® Canada, Jul'17 Oct'17 and Mar'18 (n=4,321) Canadian regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE

The data was collected in Canada in July 2019 and July 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they were at least 19 years old; drank red, white or rosé wine at least once a month; and have bought wine in the off-premise or in the on-premise

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

The data is representative of Canadian regular wine drinkers in terms of gender, age and Canada Provinces

The distribution of the sample is shown in the table:

		Jul-19	***Jul-20***
	n=	***1000***	***1000***
Gender	Male	50%	51%
	Female	50%	49%
	Total	***100%***	***100%***
Age	19-24	9%	7%
	25-34	20%	22%
	35-44	22%	18%
	45-54	13%	17%
	55-64	18%	17%
	65 and over	18%	20%
	Total	***100%***	***100%***
Province	Quebec	25%	25%
	Ontario	39%	38%
	West	30%	31%
	Other Provinces	5%	5%
	Total	***100%***	***100%***

Source: Wine Intelligence Vinitrac® Canada, July 2019 (n=1,000) and July 2020 (n=1,000) Canadian regular wine drinkers

RESEARCH METHODOLOGY: QUALITITATIVE

MARKET EXPERT INTERVIEWEES

Trade interviews were conducted with three experienced industry professionals in the Canadian wine market in 2020

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The three interviewees were members of the wine industry working in different roles:

1 x Wine Producer and Importer

1 x Wine Importer

1 x Wine Marketing Manager

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Wine Intelligence London (Head Office)

109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ

Telephone: +44 (0) 208 194 0090
Email: info@wineintelligence.com
Website: www.wineintelligence.com
Follow us: