WINE INTELLIGENCE

CANADA: WINE PACKAGING FORMATS

SEPTEMBER 2020

REPORT BROCHURE

PRICING

Report + data table

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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.

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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