



WINE INTELLIGENCE

# CANADA PORTRAITS 2021

SEPTEMBER 2021



# PRICING

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# How Portraits works

## What is Portraits?

- Portraits is the name given to a series of wine attitudes and behaviour segmentations by Wine Intelligence, providing wine businesses with a reference segmentation of wine drinkers in key global markets that can be applied to individual brands, regions, countries of origin, style categories and retailers
- Canada Portraits 2021 is the 7<sup>th</sup> edition of our Canada market segmentation. Portraits are also available for the US, China, Australia, UK and, later on this year, Portugal

## How we develop Portraits...

- Wine Intelligence uses factor and cluster analysis to group consumers into distinct segments based on their answers to questions about their wine-drinking behaviours and their attitudes towards wine. Once consumers have been identified as belonging to a specific segment, these segments are profiled based on a set of output variables, which in addition to the input variables include demographic information and more detailed questions on wine-drinking behaviour
- The individual segment descriptions are developed using an integrated research methodology utilising both quantitative and qualitative inputs
  - **Quantitative:** Analysis for Canada Portraits is based on a sample of 6,000 Canadian regular wine drinkers collected in July and October 2020, January and March 2021 via Wine Intelligence's Vinitrac® online survey. Comparisons for some measures were made against the previous Canada Portraits 2018 report
  - **Qualitative:** Interviews were conducted across Canada in August and September 2021 (see Appendix for details of the qualitative research methodology)

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# INTRODUCTION

As major wine consumption markets emerge from the shock of Covid-19, two big questions need addressing: how and why did the wine category survive, and in some cases thrive, in such difficult circumstances? And how much long-term effect will the economic upheavals and enforced behaviour changes of 2020 and 2021 have on consumer lifestyles and behaviours?

The latest update of Canada Portraits, the Wine Intelligence wine consumer segmentation model for Canada, offers some clues. The relative buoyancy of off-premise wine sales during the pandemic can be accounted for by a notable doubling-down on the category by Canadian wine drinkers who were already fully engaged in wine. These drinker archetypes, known in our model as Engaged Explorers and Enthusiastic Treaters, account for just 18% of drinkers but over \$4 in every \$10 spent on wine.

As to why, the Covid-era restrictions on socialising and eating out appear to have fostered an innovative approach to wine drinking occasions amongst the committed drinker groups. New wine consumption occasions emerged from the pandemic. After an initial surge in lunchtime wine drinking, this habit has reduced, and instead consumers appear to be bringing forward 'wine o'clock' to late afternoon, and also deploying wine in online socialising.

Crucially, both segments have opted to recycle their disposable income normally spent on a bottle in a bar or restaurant into a higher quality and more expensive bottle in the LCBO, liquor store or supermarket. The result has been a sustained boost in spend per bottle in off-premise over the past year, particularly for Engaged Explorers, the most involved and knowledgeable segment, though in both cases the frequency of consumption has not changed much.

Where frequency has increased – and therefore most likely the drivers of volume in Canada over the past year – is amongst Mainstream Suburbans, the archetype representing the older, settled middle ground of Canadian wine drinkers. Whilst this group has largely resisted the temptation to spend more per bottle on wine in off-premise, the Covid effect here has been an increase in consumption for occasions outside of mealtimes at home.

To the second question, around what the long-term effect might be, the news is more mixed. The segment representing the wine category's future in Canada – Social Newbies – has shrunk in size from almost a quarter of Canadian regular wine drinkers in 2018 to a fifth in 2021. In part this is a demographic issue, with an ageing population weighting the wine drinker profile older. However, there is also a noticeable Covid effect, with Social Newbies less likely to have transferred their normal wine drinking in on-premise social situations into at-home lockdown settings. Instead, they appear to have migrated more to beverage categories such as beer and hard seltzer – single serve, cheaper, and more aligned with non-social at home consumption.

Connected with this, the least engaged archetype of Canadian wine drinkers, Kitchen Casuals, have seen their numbers boosted from 22% of all drinkers in 2018 to 29% in 2021. This group buys wine when it has to, but tends not to choose it actively or regularly. They rarely drink wine in out-of-home situations. No doubt the boost in their numbers is partly down to closure of on-premise during Covid, and we expect this segment's size to reduce slightly over the next few years.

# EXAMPLE SLIDE: CANADA PORTRAITS: WINE DRINKER SEGMENTATION (2021)

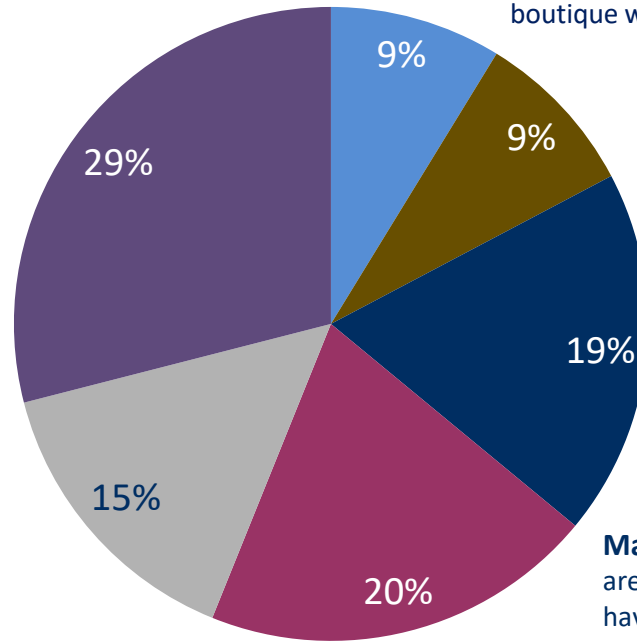


% share of Canadian regular wine drinkers by Portraits segments Canada 2021

**Kitchen Casuals:** An older segment of infrequent and low-spending wine drinkers, with few consuming wine in the on-premise. A larger segment than in previous years, showing little interest in the category, sticking to mainstream lower-priced brands when purchasing wine

**Contented Occasionals:** One of the oldest segments, they are infrequent drinkers, the least involved and lowest spenders. Time in the category means they have good knowledge, but purchase wine from a narrow repertoire of mainstream, lower-priced brands they are familiar with

**Social Newbies:** The youngest segment, who are inexperienced in the category with lower knowledge and confidence. A smaller segment than in previous years, they often drink wine in social occasions, with wine not fully integrated into their lifestyle. They are price-conscious, often seek out wines within a price range they are comfortable with and will have an eye out for promotions



**Engaged Explorers:** Mid-aged, confident wine drinkers for whom wine is an important part of their lifestyle, drunk socially with friends and also for everyday occasions. They are the most knowledgeable and confident segment, willing to explore more boutique wines from smaller producers

**Enthusiastic Treaters:** One of the younger segments (Millennials) who are frequent social drinkers, but still lack knowledge in the wine category. They are typically less experienced in the wine category but are keen to explore and learn more. They are a highly sociable group, especially in the on-premise, with wine often being the topic of conversation. They are the most likely segment to purchase wine from online channels

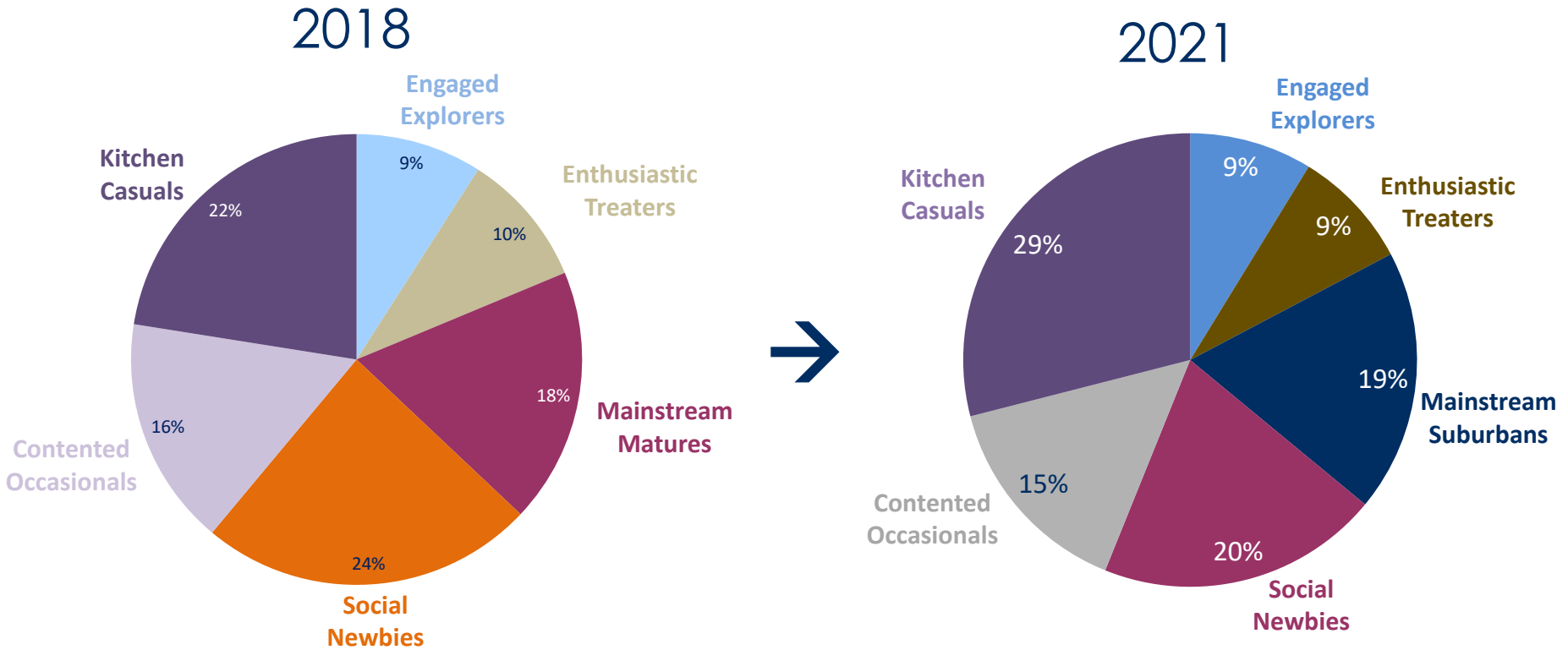
**Mainstream Suburbans:** the oldest segment, who are frequent wine drinkers for everyday occasions, yet have lower per bottle spend. Wine serves a purpose of accompanying meals and they make a conscious effort to pair wine with food. They are open to trying new wines, but tend to stick to mainstream brands and varietals that deliver good value

# EXAMPLE SLIDE: CANADA PORTRAITS: 2018 → 2021: WHAT'S CHANGED



In 2021, Kitchen Casuals account for a larger proportion of the Canadian wine drinking population whilst the share of Social Newbies has decreased

% share of **population of Canadian regular wine drinkers** by Portraits segments Canada 2018 vs. 2021



Source: Wine Intelligence, Vinitrac® Canada, July and October 2017 + March 2018, (n=4,321) Canadian regular wine drinkers

Wine Intelligence, Vinitrac® Canada, July and October 2020 + January and March 2021, (n=6,000) Canadian regular wine drinkers

# EXAMPLE SLIDE: ENTHUSIASTIC TREATERS: ALCOHOLIC BEVERAGES

Enjoy a wide range of alcoholic beverages



## What do they drink?

- Enthusiastic Treaters are **willing to try and experiment with a range of alcoholic beverages**. Beyond wine, they enjoy beer, spirits (vodka, rum and whisky) as well as cocktails
- They **enjoy a range of red, white, rosé and sparkling wines**. Drink choices vary by occasion, with sparkling wine consumed more for special occasions
- Likely to have an extensive collection of alcohol at home to make their favourite drinks, especially for cocktails

### Compared with others, they often enjoy:

Red wine, white wine, beer, spirits,  
Champagne and cocktails

“I sometimes drink sparkling wine but mainly for special occasions. This weekend for example, we went to a spa and drank a bottle of Champagne”  
*Enthusiastic Treater, Male*

“I like most things but I usually drink wine, beer and cocktails”  
*Enthusiastic Treater, Male*



## Top 10 alcoholic beverages: Past 12 months

% who have drunk the following alcoholic beverages in the past 12 months

Red wine	96% (84%)
White wine	82% (77%)
Beer	79% (69%)
Vodka	62% (47%)
Whisky / Whiskey	53% (37%)
Rosé wine	48% (37%)
Rum	51% (38%)
Craft beer	51% (33%)
Champagne (French Champagne)	40% (22%)
Cocktails	40% (26%)



Inside an Enthusiastic Treater's home

(%): All Canadian RWD

% / % Statistically significantly **higher** / **lower** than all Canadian regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Canada, July and October 2020 + January and March 2021, (n=6,000) Canadian regular wine drinkers

Wine Intelligence, consumers interviews



# EXAMPLE SLIDE: MAINSTREAM SUBURBANS: VARIETALS



Tend to stick to mainstream varieties



## What do they drink?

- Grape variety is the most important choice cue when deciding which wine to wine
- More likely to enjoy the more commonly drunk varieties in both red and white
- They enjoy a smaller range of varieties than other groups and are less likely to choose some of the less well-known grapes

Compared with others, they are particularly fans of wine from:

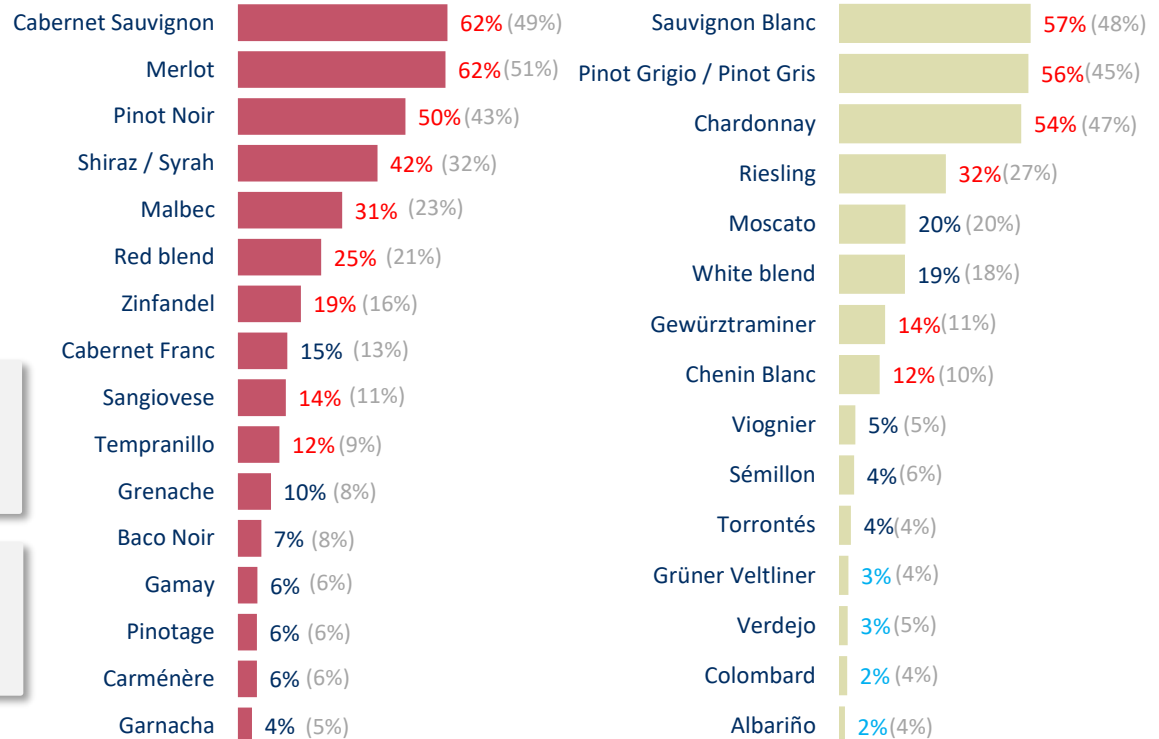
Cabernet Sauvignon, Merlot, Sauvignon Blanc, Pinot Grigio / Pinot Gris, Chardonnay and Riesling



## Varietal consumption



% who have drunk the following varieties in the past 6 months



“I would usually swap towards Rieslings more often than anything else. I do also like Chardonnay and Chenin Blanc as I find them crisp and not too dry”

*Mainstream Suburban, Female*

“I am usually looking for a particular varietal, like Sauvignon Blanc. That is my favourite white and I would say Cabernet Sauvignon or Merlot are up there in terms of red”

*Mainstream Suburban, Female*

(%): All Canadian RWD

% / % Statistically significantly higher / lower than all Canadian regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Canada, July and October 2020 + January and March 2021, (n=6,000) Canadian regular wine drinkers

Wine Intelligence, consumers interviews

# RESEARCH METHODOLOGY: QUANTITATIVE



- The data for this report was collected in Canada in July 2020, October 2020, January 2021 and March 2021
- 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 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:

		<b>July-20- Mar-21 n= 6,000</b>
<b>Gender</b>	Male	51%
	Female	49%
	<b>Total</b>	<b>100%</b>
<b>Age</b>	19-24	6%
	25-34	22%
	35-44	19%
	45-54	17%
	55-64	16%
	65 and over	19%
	<b>Total</b>	<b>100%</b>
<b>Province</b>	Quebec	28%
	Ontario	38%
	West	29%
	Other Provinces	5%
	<b>Total</b>	<b>100%</b>

Source: Wine Intelligence, Vinitrac® Canada, July and October 2020 + January and March 2021, (n=6,000) Canadian regular wine drinkers

## CONSUMER INTERVIEWEES

Consumer Interviews were conducted with consumers located across Canada in August and September 2021

The interviews lasted between 30 and 45 minutes and were done via phone or Zoom, covering general wine drinking and buying behaviours and preferences, motivations and attitudes towards wine and purchase choice cues

Sample size n = 15

## Ready to purchase?

- [Buy online](#)
- Request an invoice by emailing [enquiries@wineintelligence.com](mailto:enquiries@wineintelligence.com)

## Need to know more?

- Email [enquiries@wineintelligence.com](mailto:enquiries@wineintelligence.com) with your question(s)



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