2019

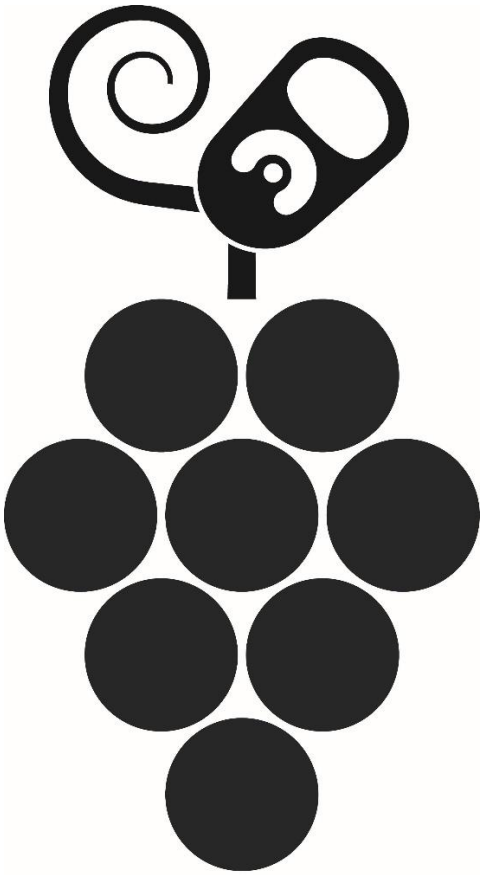
WINE-IN-A-CAN

MARKET

IMPLICATIONS

Report WICR 2018 FR

WiC RESEARCH



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EXECUTIVE SUMMARY

This report reveals drivers for idiosyncratic assets/benefits associated with packaging wine in cans. Findings from two surveys (totaling nearly 1,000 respondents) contributed to assessing general and brand-specific awareness and consumer perceptions are explained. Additionally, the current production and distribution practices for over 250 winemakers and 600 wine-in-a-can product lines, across 25 U.S. States and 21 countries contributed to the understanding of this market.

Significant Implications include:

1. Six main drivers stimulate interest in and are promoting the expansion of the wine-in-cans market. These six inter-related consumer pull and supplier push drivers are: **1) convenience, 2) occasion expansion, 3) sustainability/cost savings, 4) quality, 5) portion control and variety, and 6) visual image/branding.** Each driver is complex, multi-dimensional, and in some instances overlaps with one or more of the other drivers. Perhaps the most important driver of the wine in cans market is Convenience, but it is heavily linked to Occasion Expansion.
2. Qualitative comments from the two independent surveys of those who did taste the product were overwhelmingly positive.
3. Gender nor education significantly influences the awareness, consumption or purchasing practices of consumer survey respondents.
4. The level of self-reported wine knowledge across the awareness, consumption, and purchasing variables reveals no differences; i.e., those consumers with high level wine knowledge were just as likely to taste, purchase and enjoy wine in a can.
5. Individually-sized portions per can means consumers do not need to open a full bottle of wine to enjoy one or two glasses of wine whether at home or away.
6. Consumers can drink a glass by themselves, and even match single glasses of different wines with various meal courses and food pairings.

7. Analysis supports the strong use of occasion-branding and novel distribution channels (product placement at point-of-occasion, in unique venues) as producers bring their offerings into this new wine category.
8. Early adopter producers of wine-in-a-can see it as an extension of their wine into new markets as opposed to a mere substitution or cannibalization of traditional bottled wine.
9. Generation groups showed no differences in their purchasing practices.
10. Consumer wine knowledge and market demographics (gender, age, education) are of less importance than occasion expansion and the convenient placement of wine-in-a-can purchasing opportunities that correspond with lifestyle interests across ages.
11. Convenience, portion packaging and expanded occasion/location wine consumption opportunities were cited as dominant reasons for trying and enjoying wine in a can. Hence, **perceptions that consumers with higher-end wine knowledge will not consider wine-in-cans, are faulty.**

As awareness for this innovative wine packaging continues to grow, it is becoming clear to wine makers, distributors, retailers, and most importantly, consumers, that this time around wine-in-a-can is not a fad, rather it represents a significant, new wine category that is finding a permanent positive place in the overall wine market.

INTRODUCTION

To better understand the potential impact of this new wine category, this report first provides a brief review of the slowing growth within the overall wine industry, the history of wine-in-a-can packaging, and explains the wine can filling process. Next it provides findings from primary and secondary data, and ends by discussing how *wine-in-can* packaging is a robust trend as opposed to a short-term fad, and documents how within the past three years it has become an expanding alternative category in the wine industry.

Current Overall U.S. Wine Market

The U.S. wine market (from all production sources) has exhibited markedly slower growth over the last few years, with weak year-to-year growth in both shipments and retail value in 2017 (1% and 2% respectively), and an average of 1.5-4% growth since 2014, as shown in Table 1. According to the 2018 Silicon Valley State of the Wine Industry Report the successful wineries 10 years from now will be those that adapted to a different consumer with different values (McMillan, 2018).

Table 1: Growth in US Wine Shipments and Retail Value (McMillan, 2018)

Year	Wine Shipments (case)	Yr-Yr Growth	Retail Value $	Yr-Yr Growth
2017	403.4 million	1%	$62.2 billion	2.0%
2016	398.8 million	2.9%	$61.1 billion	6.4%
2015	378.8 million	2.3%	$57.4 billion	3.4%
2014	377.5 million	.003%	$52.3 billion	.06%

The top-selling varietals sold in bottles in the U.S., by volume (domestic & imported, Nielsen-measured off-premise sales) are shown in Table 2:

Table 2: Top Selling Varietals – U.S. Bottles (Advisor Press Release, 2018)

Chardonnay
Cabernet Sauvignon
Red Blends
Pinot Grigio/Gris
Pinot Noir
Sauvignon Blanc
Merlot
Moscato/Muscat
Rosé
White Zinfandel

The ranking for wineries and distributors is shown in Figures 1&2, with E&J Gallo, The Wine Group, and Constellation Brands being the largest US Wineries, and Southern Glazer's and Republic National/Breakthru Beverage (post-merger) being the two largest US Distributors. The distribution of wine is concentrated, with Southern Glazer's and Republic National/Breakthru Beverage accounting for over 50% of current U.S. sales.

Producer	Annual U.S. Case Sales
E. & J. Gallo	75 million
The Wine Group	57 million
Constellation Brands	51 million
Trinchero Family Estates	19 million
Treasury Wine Estates	15 million
Bronco Wine Company	10 million
Delicato Family Vineyards	9.2 million
Ste. Michelle Wine Estates	9 million
Jackson Family Wines	6 million
Viña Concha y Toro (Fetzer Vineyards)	2.75 million
Bogle Vineyards	2.3 million
Francis Ford Coppola Winery	1.7 million
C.K. Mondavi Family Vineyards	1.7 million
Precept Wine	1.7 million

Figure 1: Winery rankings, 2016 (WBM, 2016)

TOP 10 U.S. WINE DISTRIBUTORS

1	Southern Glazer's Wine & Spirits	6	Heidelberg Distributing Co.
2	Republic National Distributing Co. (RNDC)	7	Wine Warehouse
3	Breakthru Beverage Group	8	Martignetti Cos.
4	Young's Market Co.	9	Empire Merchants
5	Johnson Brothers Liquor Co.	10	Winebow Group

Source: Wines Vines Analytics.

Figure 2: Top 10 Wine Distributors

The leveling in traditional wine sales coupled with changing consumer practices is prompting the industry to seek growth in new places; one successful way is packaging wine-in-cans.

Current U.S. Wine-in-Can Market

Within the past few years, the application of canned packaging of wine has seen explosive growth. Nielsen reported that in 2018 canned wine sales of $50 million were up a whopping 69 percent and the volumes were up 47 percent. (Source: Wine & Spirits Daily, January 2019) In the year ending June, 2018, wine-in-can sales increased 43% from 2017. This very high growth rate stands in contrast to the diminishing growth of on average 4% or less for all US wine sales, as was illustrated in Table 1 (Marketwatch.com; BW166, 2018). Inc. Magazine listed the wine in can market as one of the best industries in 2018. All of the 10 top selling bottle varietals (Table 2) are also packaged in a can. Similar to the growth of Rosé in bottles, Rosé packaged in a can is also a leader in this market segment.

Four out of the top five largest wineries are in the wine-in-a-can market: E&J Gallo, The Wine Group, Constellation Brands, and Treasury Wine Estates.

Top Wine-in-Can Sellers

Some major wine-in-can sellers, their brands, and (location) include:

E. J. Gallo - Dark Horse (CA), Barefoot (IL) brands

Union Wine Company - Underwood (OR) brand

Francis Ford Coppola - Sofia and Diamond (CA) brands

TIMT - The Infinite Monkey Theorem (CO and TX)

Precept - House (WA), West Side (CA), Ste Chappelle (ID) and J. Leonne (NM)

The Wine Group - Flip Flop, Big House, Ava Grace (all CA brands)

Field Recordings – Alloy Wine Works, Fiction, Foxie, Hoxie and Book Club (all CA) brands

Treasury Wine Estates - A'tivo, Squealing Pig, T'Gallant (all AU brands)

Constellation Brands – Crafters Union (CA), Arbor Mist (NY) brands

Mionetti – Bollicini (Italy) brand

Barokes – Barokes, Billyrock Station, Bridge, Bin 121, Kangawine, Vin de France (all AU)

Distribution / Retailing Wine-In-Cans

Retail outlets include wineries themselves, as well as wine & liquor stores, supermarkets, convenience stores, and other outlets, depending upon individual state and federal regulations. Retailers are affected by customer demand, distributor and Direct-to-Consumer (DTC) issues. Wine in cans are also finding their way into restaurants and are being marketed to venues that have not traditionally served wine (stadiums, beach and pool, boating clubs, zoos, etc.).

- CH & Co Group is now serving Winestar wine in sustainable packaging [cans] at ZSL London Zoo, Wakehurst Place, Tower of London, Elstree Studios, Royal Botanic Gardens, Kew and Birmingham Botanical Gardens through its specialist commercial business, Ampersand (Hospitality, 2017).
- Mancan has sponsored the Cleveland Browns NFL team, and sells Mancan exclusively in the stadium, as well as in FirstEnergy Stadium, Phoenix, Nationals Park in Washington, D.C., Little Caesars Arena in Detroit and Dodger Stadium.
- Ste. Michelle Wine sells their Merf and Anew brands at CenturyLink Field in Seattle.

- In Japan wine in cans are very popular, but even more popular (and perhaps driving sales) is Japan's embrace of vending machines to deliver wine in cans, as well as fancy gift boxes for a more upscale presentation, as depicted in Figure 3. According to Barokes, the Japanese market readily accepted wine in can packaging because cans represented quality to the traditional Japanese food/beverage consumer. (Stokes, phone call, 2018)

Figure 3: Japanese liquor vending machines.

- Wineries who offer both bottles and cans may have an advantage by utilizing existing bottle-distribution networks.
- Conversely, offerings from small wineries are limited to smaller distribution outlets, and are often based upon personal relationships or local idiosyncratic attributes.

Pricing of Wine in Cans

Wine in cans is a growth category relatively early in its Product Life Cycle, hence the effects of competitive pricing or promotional pricing to increase sales have less of an impact or necessity, unlike more mature industries (like wine in bottles). Pricing varies based on wine quality, can size and other factors. However, as the wine in can phenomenon becomes more accepted and remains in high consumer demand, premium wine offerings are entering this space, more competitors are entering (with or without a winery), and the pricing dynamic should become more of a segmentation factor.

For example, prices for 187ml sizes range from $1.00/can for Simpler Wine from Trader Joe's (roughly $4.00/bottle) to $8.30/can ($33/bottle) for Nomadica. The 250ml cans range from $2.20/can for Flip Flop ($6.60/bottle), to $4.99/can ($14.97/bottle) for Free Public.

Sans sells a premium 375ml Cabernet Sauvignon '17 wine in a can for $25, (equal to $50/bottle) which is only sold in a 3-pack for $75, a Carbonic Carignan '17 (375ml) sold for $15 only in a 3-pack for $45 ($30/bottle), and a Rutherford Riesling '17 (375ml) for $15 sold only in a 3-pack for $45 ($30/bottle) (Figure 4). Both the Cabernet and the Riesling were rated 90 Editor's Choice by Wine Enthusiast.

Figure 4: Sans Cabernet Sauvignon; Riesling (Rated 90 Editor's Choice by Wine Enthusiast)

PACKAGING/CAN SIZES

The Alcohol and Tobacco Tax and Trade Bureau (TTB) governs the sale and trade of wine in the U.S. Wine can legally be canned in 187ml, 250ml, 375ml, 500ml and 700ml sizes (see Table 3). The most popular can sizes are related to government TTB regulations, industry serving standards, winery preferences, customer demand and retailer considerations. Only the 187ml, 375, 500, and 700ml sizes can be sold as a single serve or multiples, while the 250ml sizes can only be sold as multiples. Retailers don't traditionally like small cans, in terms of shelf reconfiguration, hence part of the popularity of the 375ml size. According to Barokes Sales & Marketing Director the 187 and 250ml sizes fit the convenience, portion control, and single serve attributes that they believe consumers of wine-in-a-can value (Stokes, Phone call, 2018).

(Note: WICResearch.com is exploring the can size issue. Survey results will be available Spring 2019, "Consumer Can Size Preference and Image – Wine-In-Cans, 2019")

Table 3. Most popular wine can sizes.

187 ml (5.3 oz., 4 servings to a standard 750ml bottle) $1/can ($4.00/bottle) to $8.30/can($33/bottle)	1 serving	
250 ml (8.8 oz., 1/3 standard bottle) $2.20/can ($6.60/bottle) to $4.99/can ($14.97/bottle)	1½ servings	
375 ml (12.7 oz., ½ bottle) Up to $25/can ($50/bottle)	2 servings	
500 ml (16.9 oz., 2/3 bottle)	3 servings	

Note: Size of pours vary

There are some outlier can size offerings, such as 200ml, 700ml, as well as some in ounces, such as 10 oz. and 12 oz. (355ml), although most of these sizes are sold outside the U.S.

Cost of Canning

According to figures from Iron Heart Canning Co., the cost to can wine depends on the 1) Label, 2) Can size, 3) End, 4) Tray and 5) Pak-Tech. For example, total costs for canning a 750ml equivalent volume is $.86-$2.43, versus $1.25-$4.58 for traditional bottling. (See Appendix B)

Can Manufacturing

The largest canner in the U.S. is Ball Corp., and its UK subsidiary, Rexam, who offer a wide range of can configurations and associated service options to their customers. Ball produces 187ml and 250ml cans in Wallkill, NY, and 375ml cans in Fairfield, CA (Ball Handout, 2018). (View this video of their canning process). According to the Can

Manufacturing Institute, major U.S. aluminum can makers that produce cans for wine packaging include Ball Corp./Rexam (U.S. LEADER); Ardagh Group, and CROWN Holdings, Inc.

Sustainability

A significant aspect which contributes to the aluminum can value proposition is the fact that aluminum cans offer 100% recyclability – indefinitely. This video highlights the sustainability value and infinite use, including the fact that 75% of all aluminum produced is still being used today: https://www.youtube.com/watch?v=7dK1VVtja5c

The Canning Process

Packaging wine in cans is a holistic, integrated process that requires coordination between winemakers, can manufacturers and can fillers in order to maintain the integrity of the wine (Stokes, phone call, 2018).

Can Interior Coating

The can's interior coating, also referred to as lining, is key to maintaining the integrity of the canned wine product. In most cases the coating is applied to the can during the can manufacturing process.

Filling Process

The process of filling an aluminum can with wine can be done in one of three ways. The can is filled either by (1) having a mobile canner (filler) who brings the portable canning line to the winery, (2) by outsourcing canning to a local 3rd party filler who has a permanent canning line, or (3) installing an in-house canning line.

1. **Mobile canning**

Wineries may enter the wine in cans business with less risk and upfront capital expenditures by having a mobile canner come directly to their winery. Mobile Canning Systems Affiliates represents the largest canning group in the world. Since the evolution of the small independent mom-and-pop mobile canners who sprang up to serve the booming craft beer market in the mid-2000's, the mobile canning market is maturing. Recently it was announced that Iron Heart Canning had become the nation's largest mobile canner, with three recent acquisitions: Land

of the Sky Canning, River City Canning and Buckeye Mobile Canning. Iron Heart now operates 34 canning lines across 17 locations from Maine to Florida (see map, Figure 6). This consolidation reflects a maturing in the mobile canning market. This link depicts the canning process used by Iron Heart, starting from removing the mobile line equipment from the truck, setup, and operation.

Figure 6: Mobile Canning Systems Affiliates Coverage

Iron Heart Canning (NH)

Armadillo Mobile Canning, (Austin, TX)

Beer Dudes Mobile Canning (Denton, TX)

Buckeye Mobile Canning (OH)

Land of the Sky Canning (NC)

River City Canning (MD)

Midwest Mobile Canning (IL)

Other canner/fillers include:

Mobile Can Man (NY)

Spokes Mobile Canning (WA)

Mobile West Canning (CA)

Mobile Canning Colorado (CO)

Toucan Mobile Canning (TN)

Beer Monks (CA)

Old Dominion Mobile Canning (VA)

- Cask Brewing Systems, the Official Agent for the supply of aluminum cans to customers of Ball, the world's largest aluminum can producer.
- Varni Brothers Corp. in California fills for Sophia.
- AWDirect (Sonoma CA) works with The Can Van, from San Francisco, CA
- Mother Road Canning, Albuquerque NM and Springfield, MO
- Polymer Canning Systems, Chicago, IL

2. **Outsourcing**

Where it is more convenient, flexible or financially advantageous a winery can deliver its wine to a local canner for filling. Examples of 3rd party outsourcing fillers include:

- Free Flow, Napa, CA (Jan. 2018 canning for 25 customers – 100 winery waitlist)
- American Canning in Austin, TX
- Wild Goose, Boulder, CO (also offers mobile canning)
- Eastside Distilling (Portland, WA) and Star Beverage (France) canning line fills for three popular sizes: 187ml, 200ml and 250ml.

3. **In-house canning line**

When volumes at a winery get sufficiently large, the winery may migrate from a mobile canner or an outsourced canner, and begin in-house canning. Cask Brewing Systems is a manufacturer of canning lines, and is also the Official Agent for the supply of aluminum cans to customers for Ball Corporation. (note: they also supply cans for products other than wine).

Can "Label" Design Technology

A 360-degree impression can be created by using applied labels after canning, or before filling using "shrink wrap" plastic covers or direct printing onto the can. Most wine-in-can producers use either sleeves, or direct-print. Each option has its own pros and cons, but cost & minimum order quantities, delivery time and color are major factors. Other design features include colored ends or colored tabs.

For direct printing, the canner/filler Cask Inc. specifies that Ball Corporation requires pre-press complete artwork. Pre-press artwork is artwork that is complete in every detail, shows color

separations, wet on wet screen builds, stayaways, etc. and does not require any modifications. This requires the services of a qualified engraver who takes camera ready artwork to the pre-press complete stage. This link explains the process. Ball provides customers with contacts for preferred authorized printers.

This direct printing is used for larger fill runs. In 2016 the minimums for printed cans were very high—around 110,000 for a 375ml size and 130,000 for the 250ml can (Mohan, 2017). Today a minimum order from Ball has increased to 230,000+ cans, depending on size (Pregler, 2018). "Ball is the company to work with if you're going to print directly on cans. The issue we had was that their quantities were very high. It would require us to produce more than we wanted to, and we would also have to plan a good solid six months in advance." (Mohan, p.1 2017).

Sleeves can be delivered to the filler in weeks, whereas direct-print takes at least 6 months. While the shrink wrap sleeves are more expensive per can to produce, the sleeves are available in smaller minimum quantities, making this option attractive to wineries with smaller production capacity. CanSource is the leader in can sleeving services in the US and Canada.

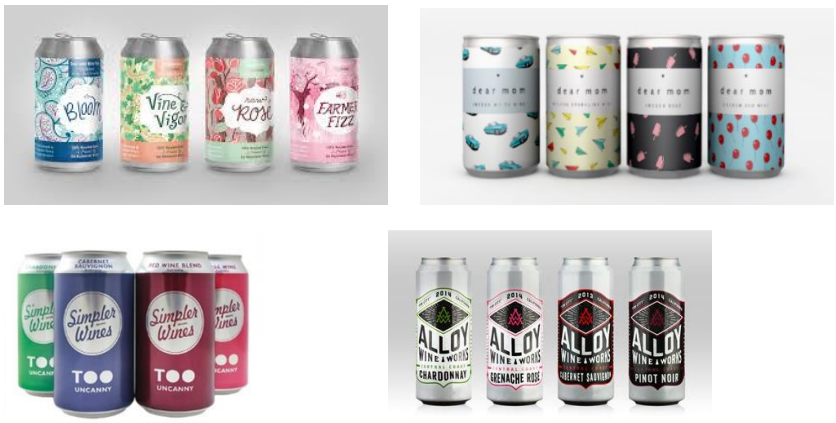
> "With this [wine] brand, it's more of a just-in-time bottling, so we don't necessarily know six months from now what we're going to be doing. When we first put the product in the market, we needed to see how it performed before we could commit to another run" (Mohan, 2017).

While the minimum for direct print cans versus sleeves was a concern for *Essentially Geared* Wine, they wanted to take advantage of the advancements in printing capabilities, believing that the quality of graphics and overall aesthetic between print and sleeve is like night and day. *Essentially Geared* cans are direct printed in four colors, but a new design for a brand extension will fully utilize six-color process printing.

The aspect of the 360 degree printing, especially when coupled with the individual aspect of packaging wine in a can, enables a brand to use their packaging graphics to highlight their differentiated competitive advantage, in terms of driver #6. This also benefits customer engagement via social media (Instagram, etc.) using both the individual can labeling and exterior packaging visuals (pp.18-19).

Examples of paper label, shrink wrap and direct printing can formats is shown in Figure 8 below:

Paper Label



Shrink wrap

Digital Print

Figure 8: Creative packaging designs of wine-in-can brands. (Source: WICR-2018-3 Report)

Exterior packaging

Wine-in-cans are generally packaged as singles, or in 3-4 paks, but other options include 6, 9, or 10-paks as well as 24 to a case (online only). The exterior packaging provides another level of advertising possibilities (Figure 9). Even the use of only caps (example Tiamo) permits the vibrant can packaging to create an exterior packaging image. Both packaging on the can and on the "box" help to create powerful images for the winery brand.

3 pack

3 pack carrier

3 pack stack

3 pack flat

4 pack caps

4 pack cube

4 pack box

4 pack octagon

24 case (375ml)

Barokes gift 10-pack (250ml)

Wine Society 9-pack (500ml)

Figure 9: Examples of multi-can exterior packaging

WINE IN CAN CONSUMPTION and MOTIVATION DRIVERS

Six Main Drivers

Analysis uncovered six main drivers which stimulate interest in and are promoting the expansion of the wine-in-cans market. These inter-related consumer pull and supplier push drivers are: 1) convenience, 2) occasion expansion, 3) sustainability/cost savings, 4) quality, 5) portion control and variety and 6) visual image/branding. Each driver is complex, multi-dimensional, and in some instances overlaps with one or more of the other drivers. Perhaps the most important driver of the wine in cans market is Convenience, which is heavily linked to Occasion Expansion. This video link is an example of all 6 drivers: on a boat at a jazz concert in Buffalo, NY.

1. Convenience: carrying, opening and finishing.

- Consumers can take wine-in-a-can where it is inconvenient or illegal to take a bottle, such as beach/pool, outdoors/camping, etc.
- It is less cumbersome to open a can vs a bottle, since it doesn't involve a foil cutter or cork screw. For example, Backpack was conceived after founder Jim Doehring failed to bring a corkscrew to a picnic, causing the occasion to be "less romantic".
- There is no need to finish the whole bottle shortly after opening (also see portion control and variety).

2. Occasion Expansion (Location and Event)

Another primary reason that the wine-in-a-can market is exploding is that its convenience and portability enable it to be served in places that traditional wine in bottles/glass cannot.

The convenience and portability associated with packaging wine in aluminum cans permits new wine consumption based on two new occasion dimensions: (1) location and (2) event. Location occasion involves places where traditional bottles are not practical: on boats, at the beach, hiking, camp-grounds, tailgating, pool parties, golf course and other active lifestyle situations. Event occasions where offering single-serve wine is desirable, including events such as: bridal or baby showers, weddings, graduation parties and family BBQ.

For example, it is reported that Francis Ford Coppolla created the U.S. wine-in-can category packaging his wine in 2002 (and named it Sofia, after his daughter) to serve at her pool-side wedding and avoid bottles and glasses.

The consumer demand generated from such occasions is a main driver to overall increases in wine sales – as opposed to the cannibalization of bottled wine sales. The fast double-digit growth of wine in cans is not stealing business from the already strained wine market growth of 1-4%, instead it bolsters total wine sales.

3. Sustainability/Cost Savings

Aluminum is 100% recyclable, infinitely, (video) and packaging wine in cans results in a very small environmental footprint. Rexam (a Ball subsidiary can manufacturer) is offering Cradle-to-Cradle Certification to illustrate the value that aluminum cans offer. The Rexam can manufacturing process starts with an aluminum ingot, is processed into a beverage can, is filled, consumed, and the recycled can is melted down and turned back into an ingot again. The eco-friendly aspect of wine in can packaging attracts attention from the ever-increasing eco-conscious consumers who value sustainability. According to the CEO of EXAL Corp., the largest producer of impact extruded aluminum containers in the world:

- 51% of Millennial consumers indicate that before buying a product they check labels for sustainability claims.
- Sustainable products grew 4x the rate of non-sustainable products (Nielsen)
- Consumers are willing to pay 15% more for sustainable packaging (McKinsey)
- 66% of consumers will pay more for sustainable brands (Nielsen)

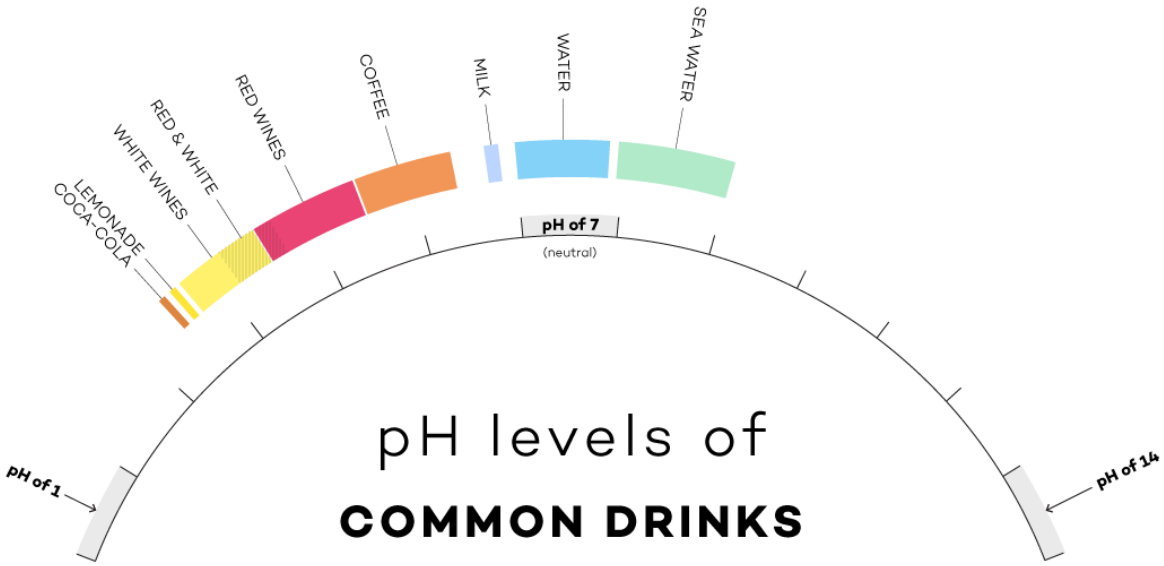
Packaging wine in aluminum cans versus glass bottles also yields savings of approximately 15-20%, with some producers claiming as high as 40%, due to lighter weight during shipping and handling, reduced breakage and efficient stacking (Advisor, 2018). A study conducted in the UK found that transporting the same total volume of packaged wine slim cans (250ml) has half the CO2 emissions of wine transported in glass bottle packaging (Scientist Live, 2018). Establishments that sell by the glass also can experience savings due to the accuracy of pours. Even at low volumes, these savings impact operating profits and allow for lower retail pricing

and/or higher margins. Boutique wine brands with limited production see canning as a way to make their artisanal wines available at attractive customer price points.

4. Quality

Wine that is packaged as a still product (no carbonation) must remove oxygen from the package and also create pressure inside the can. By adding a dose of liquid nitrogen immediately after the can is filled, then adding and sealing the lid, as the trapped nitrogen expands the oxygen is pushed out while simultaneously giving the can pressure (Beerdude Handout, 2018). This results in a superior dark, oxygen-free environment for storing/holding still wine. Likewise, when bubbly wines are canned the intended effervescence is protected within the small space.

> *"You actually have a really stable environment in a can…There's no UV penetration or oxygen exchange like there would be through a cork and glass bottle"* (Drinks News, 2018, p.5).



Source: https://winefolly.com/review/understanding-acidity-in-wine/

There are generally two major proprietary can coating methods to address the issue of pH levels of wine interaction with the can itself. Wine-in-cans in the U.S. use a coating technology offered by Ball. The cans are lined with an epoxy resin "that acts as a protective barrier between the wine and the aluminum," says Ryan Harms, owner and winemaker of Union Wine Co. in Tualatin, Ore., which produces the Underwood brand of canned wine using the Ball technology (Advisor 2018). The other technology, Vinsafe, was developed by the Australian winery Barokes, who has offered their wine-in-a-can in Australia since 1997, and is widely used in Asia, Europe, Australia, and New Zealand. The Vinsafe technology claims to be the only globally recognized, patented wine-in-a-can packaging system that has been proven to deliver consistent quality, stability and longevity in canned wine (Stokes, phone call, 2018). In the past years, Vinsafe wines have been awarded over 400 wine competition medals (Stokes Phone call, 2018). The Vinsafe technology patented by Barokes is important to the wine in can market because Baraokes owns both product and process patents for wine in a can, so "even if people try and avoid the patent by not using the whole process they generally fall within the [Baroke] product patent" (Advisor Press Release, 2018, page 1). Millions of dollars and multi-years of research to produce an effective technology precipitates Barokes vigorous protection of their patents.

A key difference between the two coating technology processes pertains to the length of the product's guarantee after filling. The guarantee offered by fillers using Ball technology is 6 months after filling, a shorter stable shelf life; whereas, Vinsafe coating technology has been guaranteed from 1-5 years.

While Ball has licensed the Vinsafe coating technology in Europe it does not currently use this technology in the U.S. market. The Ball Corporation was negotiating for a licensing agreement with Barokes in 2011 to bring canned wines to the Americas, and two American wineries had been working with Ball to introduce Vinsafe wine in a can (Schlacter, 2011). However, confirmation with the Marketing & Sales Director at Barokes confirmed there are no canners/fillers or winemakers that use the Vinsafe technology in the U.S. (Stokes, phone call, 2018).

5. Portion control, and Variety

Portion control

- Individually-sized portions per can means consumers do not need to open a full bottle of wine to enjoy one or two glasses of wine whether at home or away.
- Full serve and fast casual restaurants that have embraced wine in a can find it a perfect portion controlled pour - no guess work, no over- or under-pours. It can be poured at table side by servers or at the bar, or by the customer him or herself. In casual settings the wine is often drunk from the can itself. Francis Ford Coppola's Sofia brand is sold with an attached straw that consumers find appealing.
- The small size of the can also means it's less likely to have to deal with the issue of unfinished wine, which results in recorking or risk transporting an open container (illegal in most states).

Variety/Sample

- Wineries that adopted wine in cans generally entered the market with one or two brands/varietals and quickly added a full range/variety of choices.
- Not constrained by the quantity in a full bottle, consumers can drink a glass by themselves, and even match single glasses of different wines with various meal courses and food pairings. Likewise, a wide range of types or varietals of wine can be offered to friends.
- Data from Strongbow (cider) using 150ml cans for customer trial found that 90% of the trial were new to the brand, but purchased it because of the ability to try four different varieties in one package.

6. Visual Image/Branding

In this image-fueled Instagram-currency world, the potential of advertising design options is limitless. Wine packaged in traditional glass bottles is generally limited to front and rear labels. Conversely, aluminum cans permit a 360 degree "label", either by using a paper label wrapped completely around the can, a shrink-wrapped sleeve, or digital printing directly on the can. This 360 degree labeling allows designers to convey unique and dramatic brand images, even going so far as using glow-in-the-dark ink. The aspect of the 360 degree printing, especially when coupled

with the individual aspect of packaging wine in a can, enables a brand to use their packaging graphics to highlight their differentiated competitive advantage.

"With 64% of consumers trying a new [wine] product simply because the package catches their eye, packaging design is one of the most underappreciated marketing levers" (Freeman, 2016). In fact, Nielsen states that best-in-class packaging can drive increased attention on the shelf (+31%), increased levels of trial (+64%) and lead to more purchases (+41%) over average packaging (Fromm, 2018). This labelling potential is especially valued by smaller wineries trying to stand out on a crowded retail shelf, such as Nomadica's artist-designed cans (Figure 10).

Figure 10: Nomadica's Artist-Designed Cans (Nomadica Website, 2018).

The fun, progressive, festive nature of many of the designer cans inspires and elicits customer engagement via social media blog entries, hashtags, selfies and pictures of friends enjoying these single or double-serve wines-in-a-can. The Internet is full of selfies of customers next to colorful, creative wine in cans, far more than selfies next to bottles of wine! Popular hashtag references to wine-in-cans and what they convey:

#CanTheCork– convenience

#WineWithAView – occasion/location

#simplerbrandwines – cost savings; no pretention

#YesWeCan – quality; winery confidence

#winetasting – portion control; variety

#PinkiesDown – image; unpretentiousness.

Note: The WICR-2018-3 report contains pictures of nearly 200 different cans, cross-referenced to the database, and will be available for purchase beginning Spring 2019. For more information contact rwrenaming@gmail.com

SURVEY RESULTS

A mixed methods approach was used to comprehend the current wine-in-a-can market. It includes secondary data collection and analysis and primary data collected with two surveys, targeted at consumers/potential consumers of wine-in-a-can. Competitive market research was conducted to identify those wineries that to date have successfully entered this packaging market. The wineries, the product lines, the specific wine names/varieties, and the packaging can sizes were gathered and recorded in a database, which is available at WICResearch.com, or by contacting rwrenaming@gmail.com. Additionally, recent blogs, newsletters, trade journals, conference presentations, industry reports and academic papers pertaining to wine-in-a-can were collected and studied to determine current production, branding and distribution practices for wine-in-a-can. This includes documenting the wine-in-a can market size, the production and filling process, identifying the technically beneficial aspects of the wine canning process, extrapolating distribution benefits, and discussing the benefits of 360 degree label design. Impressions and quotes were also collected regarding why/how packaging wine in cans became a strategic decision for producers and how it is being received by wine drinking customers.

Data Collection & Analysis

Two surveys were conducted with respondents aged 21 years or older, who were consumers/potential consumers of wine-in-a-can, utilizing a combination of closed-ended and open-ended questions, plus a four-question subjective wine knowledge scale. Three researchers reviewed the data separately and then collectively. Frequencies and correlation data were analyzed and the appropriate Chi Square and ANOVA tests were performed. Additionally, the subjective wine knowledge factors were transformed into one construct and used to determine differences between those with high or low self-reported wine knowledge across other variables.

** Note: Due to their collection process, Nielsen figures throughout this report may not include all manufacturers, and may sometimes include sake and low alcohol wine coolers.*

Findings from two surveys conducted in 2018 (totaling 984 respondents) contributed to assessing general and brand specific awareness and consumer perceptions of the wine-in-a-can market across gender and generations. Differences between respondents with high versus low reported subjective wine knowledge and purchase/consumption intent was also studied.

Demographics

In Survey 1, (N= 486), 41% (200) of respondents were aware of wine-in a can and 59% (286) had never heard of wine-in a can -- 44% were males and 56 % were female. In Survey 2, (N= 498), 40% (n=197) of respondents were aware of wine-in a can and 60% (n=301) had never heard of wine-in a can -- 32% (n=133) were males and 68% were female (n=286). Respondents ranged in age from 21-88 with an average age between 33-35.

If respondents said they tried wine-in-a-can they were then asked: *You indicated that you have tried wine-in-a can. Please tell us your thoughts about this wine product.* The answers/comments provided in response to the question were divided into favorable (64) neutral or ambivalent (21) or negative (15) comments. The entire list of open-ended survey 1 and 2 respondent comments about their wine-in-a-can experience(s) is in Appendix A.

Gender [no differences]

Males and females were not statistically different in any way across awareness, trying/tasting, or the purchasing of wine in a can.

Awareness across Gender: $\chi^2 = 0.074$, $N = 418$; $df = 1$, $p = 0.786 > .05$.

Trying/Tasting across Gender: $\chi^2 = 0.460$, $N = 418$; $df = 1$, $p = 0.497 > .05$.

Purchasing across Gender: $\chi^2 = 0.180$, $N = 418$; $df = 1$, $p = 0.671 > .05$.

Educational Background [no differences]

Respondents from different educational backgrounds also were not different in any way across awareness, trying/tasting, or the purchasing of wine in a can.

Awareness across Education: $\chi^2 = 4.226$, $N = 419$; $df = 3$, $p = 0.234 > .05$.

Trying/Tasting across Education: $\chi^2 = 0.4.983$, $N = 419$; $df = 3$, $p = 0.173 > .05$.

Purchasing across Education: $\chi^2 = 6.278$, $N = 71$; $df = 3$, $p = 0.099 > .05$.

High School and Less	n = 45
Associates and Some College	n = 139
Bachelors	n = 175
Masters & Higher	n = 61
Total	N = 420

Generations (Age) [significant differences]

Respondents from different generations exhibited statistically significant differences regarding *awareness* of wine in a can; $\chi^2 = 11.946$, $N = 479$; $df = 3$, $p = 0.008 < .05$.

Respondents from different generations exhibited statistically significant differences regarding *trying/tasting* wine in a can; $\chi^2 = 23.278$, $N = 482$; $df = 3$, $p < 0.000 < .05$. Respondents from different generations did not exhibit differences regarding *purchasing* wine in a can; $\chi^2 =$, $N = 71$; $df = 3$, p 0.490 > .05.

Gen Z and Millennial generations exhibit higher awareness. Millennials also exhibit higher than expected for tried/tasted wine in a can, whereas Gen X and Baby Boomer exhibited lower than expected for both awareness and tried/tasted. Purchasing was as expected in all four generational categories. Table 4 illustrates the differences and lists residuals for any cells higher or lower than expected.

Table 4: Generations and Wine-in-Can Awareness, Tasting and Purchasing Practices

	Gen Z	**Millennial**	**Gen X**	**Baby Boomer**
Awareness	Higher than expected Residual (11.3)	Higher than expected Residual (6.3)	Lower than expected Residual (-7.6)	Lower than expected Residual (-10.1)
Tried/Tasted	As expected	Higher than expected Residual (+14)	Lower than expected Residual (-9.4)	Lower than expected Residual (-5.5)
Purchased	As expected	As expected	As expected	As expected
N = 482	187	109	99	87

Subjective Wine Knowledge

Survey 2 also asked respondents four subjective wine knowledge questions that used a 6-point Likert-style scale. The scale questions used in the survey are in Table 5.

Table 5: Four-question subjective wine knowledge scale (adapted from Flynn & Goldsmith, 1999)

Q 1	I am confident in my wine knowledge.
Q 2	Among my friends I am the wine expert.
Q 3	I don't know much about wine.
Q 4	I know more about wine than others do.

The third variable was recoded. Then the Cronbach Alpha coefficient of reliability was performed to determine internal consistency and whether the four factors could be converted into a single score that reflects subjective wine knowledge. For this analysis, N = 418 constitutes the valid response rate (cases). The N of items (variables) = 4. Cronbach's alpha, written as a function

of the number of test items and the average inter-correlation among the items was $\alpha = 0.917$, > 0.7 (the minimum standard accepted value), suggesting that all four items do form a closely related group. As Table 6 illustrates, the individual communalities were all proportionally high as well.

Table 6: Subjective Wine Knowledge Individual Communalities

	Mean	Factor λ
Q1 I am confident in my wine knowledge	$M = 3.69$	$\alpha = 0.899$
Q2 Among my friends I am the wine expert.	$M = 2.99$	$\alpha = 0.898$
Q3 I don't know much about wine.	$M = 3.24$	$\alpha = 0.898$
Q4 I know more about wine than others do.	$M = 3.72$	$\alpha = 0.888$

To further determine what, if any, underlying structure exists, data were screened for outliers and to assess normality and linearity. Outliers were not found and normality and linearity were assumed.

A factor analysis was then conducted to measures the total amount of variation observed in the four variables. Principal Component Analysis rotation and extraction further analyzed the variables in this distribution. All four variables loaded on one factor. The four factors also explained 100% of the total variance. Likewise, in all cases if the item was extracted from the construct the Cronbach alpha coefficient was lowered from $\alpha = 0.917$ to Q1($\alpha = 0.890$), Q2 ($\alpha = 0.891$), Q3 ($\alpha = 0.892$) and Q4 ($\alpha = 0.898$).

The four questions were then converted to a single wine score construct which was then transformed into a three-level categorical variable that was used to compare differences between

respondents with high, medium or low wine knowledge scores. Researchers are confident that the combined score measures subjective wine knowledge.

Subjective Wine Knowledge across Gender

Consistent with industry standards, in this study females self-report higher subjective wine knowledge scores compared to self-reported male scores. χ^2= 8.273, N = 479; df = 2, p = 0.016 < .05. M (female) = 1.84, SD = 0.836; M (male) = 1.59. SD = 0.773.

Subjective Wine Knowledge across Generations (age)

No significant differences exist in the subjective wine knowledge scores (3 categorical levels) across four generations; χ^2= 12.125, N = 418; df = 6, p = 0.059 > 0.05.

Subjective Wine Knowledge across Level of Education

No significant differences exist in the subjective wine knowledge scores across level of education; χ^2= 4.266, N = 419; df = 3, p = 0.234 > 0.05.

Subjective Wine Knowledge across Wine-in-Can Variables

Individuals with high, medium or low subjective wine knowledge scores were not statistically different in any way across awareness, trying/tasting, or the purchasing of wine-in-a-can.

Awareness across Subjective Wine Knowledge: χ^2 = 1.959, N = 418, df = 2, p = 0.375 > 0.05.

Trying/Tasting across Subjective Wine Knowledge: χ^2 = 2.529, N = 71, df = 2, p =0 .282 > 0.05.

Purchasing across Subjective Wine Knowledge: χ^2 = 1.95,9 N = 418, df = 2, p = 0.140 > 0.05.

Brands remembered by respondents

Survey 1 respondents identified 20 different wine-in-can brands. The top brands recognized by Survey 1 respondents were: Barefoot (38%), Underwood (12%), Sophia (10%), Bollicini (9.3%), Porch Pounder (4.7%), Miscellaneous brands under 3% each (21.5%) and Unknown (17.8%). Survey 2 respondents identified 15 different wine-in-can brands. The top brands recognized by Survey 2 respondents were Barefoot (27.7%), Flip Flop Wines (7.7%), Underwood (6.2%), Bollicini (4.6%), Miscellaneous brands under 3% each (24.3%) and Unknown (31%).

The top types/varietal of wine-in-a-can that were tasted or purchased by Survey 2 respondents were: White (21.2%), Rosé (20%), Red (9.4%), Sparkling (5.9%), Named Varietals (18.8%), Misc. (5.9%), Unknown (18.8%).

There were over 25 different wine-in-can brands identified in total. Four brands were market leaders: Barefoot was the most recognized brand at 34%, Underwood at 10%, and Sophia and Porch Pounder brands each recorded single digit percentages. Noticeably, with 22% Miscellaneous brands had under 3% awareness, and 25% of the brand Unknown, the results suggest that with nearly half of the brands (47.1%) not having a market presence, there are many competitive brands fighting for recognition.

This brand awareness information suggests that the wine-in-a-can market still has relatively low barriers to entry, and while regional and national distribution is increasing, the market share battle has not reached a saturation point.

DISCUSSION

As the wine-in-can trend strengthens, this new wine category is positioned to contribute to a marked upsurge in the recent leveling of overall wine sales. By evoking one or more of the six drivers identified in this report: 1) convenience, 2) occasion expansion, 3) sustainability/cost savings, 4) quality, 5) portion control & variety, and 6) visual image/branding, the wine-in-cans category has great potential to stimulate increased interest in new and existing wine consumers. Additive sales stem from increased life-style segmentation focused on occasion expansion and greater convenience, benefits pertaining to sustainability/cost, quality, portion control/variety and image for both new and existing wine customers.

Convenience, Portion control and Variety refer to the ease involved in purchasing, transporting, drinking and most significantly opening (sans corkscrew) just the right amount of a variety of wines; sometimes in the same setting like a party or a dinner that begins with a glass of sparkling wine and later a still red – convenient for 1 or 2 people.

Occasion expansion refers to new locations or events where offering wine-in-cans as opposed to glass bottles is more practical. Findings of this study reveal that when asked *Where/on what occasions?* and *Why have you consumed wine-in-a-can?* respondents' top responses were convenience and new locations or events. This suggests that a shift in focus by winemakers, from targeting *the person (demographics*), to targeting *occasions* should occur.

Looking at purchase by types or varietals also reflects that the occasion at which the wine-in-a-can is being consumed (lifestyle: adventurous, outdoors, carefree, spontaneous) is most important. This is in contrast to the varietal order of overall yearly U.S. consumption of bottled wine, that tilts towards more traditional demographic segmentation preferences. Most notable is that not only is Rosé wine-in-a-can a close #2 ranking in our survey results by type/varietal (20.2%), it ranks as the most popular among the 600 brands in our database, yet it only ranks 9th (but growing) when packaged in a bottle. Again, the study's analysis of wine types/varietals currently being packaged in cans indicates the winemakers' and consumers' choices in wine type relates more to occasion, than the person (demographics).

The focus away from people segmentation is further supported by the primary data findings of this study. Neither males nor females nor respondents from different educational backgrounds

were statistically different in any way across awareness, trying/tasting, or the purchasing of wine in a can. Likewise, the survey respondent's purchasing of wine-in-cans was as expected across all four generational categories (Gen X, Millennials, Gen Z, Baby Boomers). When looking at the person-focused aspect of subjective wine knowledge, the study also revealed no statistical differences across four generations, education, nor across awareness, trying/tasting, or the purchasing of wine-in-cans. These findings suggest that the traditional ways of segmenting and marketing to consumers of bottled wine may not be the same for this new wine-in-can category.

The study findings reinforce that Millennials tend to be "#PinkiesDown" (unpretentious and casual about their wine consumption) and identify with the brand, the can message/image and the taste, blogging such things as:

"It looks cute"

"Just enjoy while you drink it"

"Tastes good"

These low involvement Millennial consumers support Zaichkowsky's (1988) premise regarding the desire for extrinsic cues (can messages/image), as opposed to high involvement consumers who tend to ignore extrinsic cues and rely more on their own objective and subjective wine knowledge. Since Millennials are buying as expected now, at higher awareness and trial spends, producers may be wasting excess advertising and sampling costs. Millennials are keenly aware of the product category. Therefore if winemakers maintain or even reduce expenditures targeted exclusively towards Millennials, their overall purchasing revenues from this population should not be negatively affected!

Likewise, since Gen X and Baby Boomers are already purchasing at the level of Millennials with lower awareness and trial, one way for increasing sales to them may be to help them become more aware of wine-in-can's convenience and its occasion expansion possibilities at both locations and events that already appeal to them. The embedded video link contains a thank you from a Baby Boomer who can now enjoy wine on her sailboat! For this older wine in can market segment (Gen X and Baby Boomers) their awareness of the new wine in can packaging seems only important to them in relation to how it expands their wine drinking possibilities at events and locations where bringing a bottle, cork screw and glasses are not as convenient.

Further analysis of this study's secondary and primary data reveal that Gen Z and Millennials are more keenly aware of wine-in-can products, and their consumption/trial patterns surpass those of Gen X and Baby Boomers. Gen X and Baby Boomers exhibit lower than expected awareness and tried/tasted practices. Likewise, based on their current purchasing practices, which are no different from other generations – the Gen X and Baby Boomer wine consumers, both with high & low level subjective wine knowledge, should become even stronger consumers of wine in cans.

The question then is, what might increase purchasing? Millennials are more primed to purchase, based on higher awareness and trial data, making them more likely to purchase wine-in-a-can the more often it is presented to them. The results of this study also suggest that positive purchasing outcomes could be obtained by promoting and selling wine-in-cans *at expanded* locations or events – making it more available and convenient for wine consumers of all generations.

Perhaps the most significant finding of this study is the fact that regardless of subjective wine knowledge (low, high), awareness trial/tasting and purchasing practices showed no differences. This indicates that current perceptions that assume consumers with high-end wine knowledge will not consider wine-in-cans, may be dramatically faulty.

This study proposes that convenience and occasion expansion trumps wine knowledge and demographic segmentation when it comes to wine-in-a-can awareness, consumption, and purchase practices. The findings suggest that the market for wine-in-cans is not a fad, rather it represents a significant, new wine category that will be purchased and <u>enjoyed</u> across generations!

WIC RESEARCH DATABASE

WIC Research has developed a database tracking the wine-in-cans market (WICR-2018-DB). As of December 2018, it contained over 200 winemakers, from 25 US States and 21 countries, covering over 500 product lines. Database variables include the brand name, the size of the can, the types of wine, ABV, and in many instances the specific varietals that were chosen for the wine-in-can selections, packaging variation, labeling, pricing, advertising, pictures and social media data. Although most of the wine in can products emanate from wineries (large and small), there are now players in this canned wine market that are either combinations of wineries or wine makers, or packaging process entities that purchase juice/wine and brand and package it to attract the ever-increasing wine-in-can drinking consumers. With new wine-in-can products being released almost weekly, this database provides insights into the dramatic recent growth from 2002's lone brand.

For information about standard reports available to purchase from WIC Research, or custom reports or consulting, please contact WIC Research at rwrenaming@gmail.com

Available late Spring 2019

WICR-2018-DB	Database of wine-in-can competitors (above).
WICR-2019-PH	Pictures of nearly 200 different brands, cross-referenced to the database.
WICR-2019-FR	Survey 3 Summary Report.
WICR-2019-PF	Profiles of specific brands

APPENDIX A Open-ended Responses

Where the wine in can is purchased

Purchased for an Occasion or Event

Beer Distributor & Wine outlet/liquor store/wine & spirits/package store/retail shop/Total Wine/

Grocery store/supermarket

Weis Market/Stop & Shop/ Target/Walmart/Trader Joe's/Whole Foods

Purchased because of a Location.

MD/Carolina/Ocean City, N.J./the beach

Poolside

Vacation

Various

Where the wine-in-a-can is consumed

With friends
Casually hanging out with friends
With friends at a party
Party/Parties/Social
Graduation Parties
BBQs/Family BBQ
Family Party
At dinner/Dinners
Summer Holidays and outings
Wedding

Social outing
Tailgate/Tailgating/Tailgating at a football game
At a pregame
Beach, on the beach/beach weekends!/sitting on the beach
Poolside
Concerts/Concert
Super Bowl
In a beer and wine store when they were passing out samples
Supermarket
Restaurant
In Friends home
Watching movie with friends at home
Home
Relaxing
Casually
Casually, around the house/Casually at home/At home, relaxing
Casually in room/My room
Dinner with my wife
Cooking at home
It was consumed in my home, purchased out of curiosity, and regretted almost immediately.
No specific occasions, just enjoyed randomly!
Casual drinking
When I'm super upset

Favorable Comments

Very good, loved the convenience and style while being at a tailgate.
Tasty, would drink again, perfect for tailgate
Tasty alternative to your typical beer in a can.

Tasted OK, convenient liked that wit could be brought to parks/c.g's
Tasted just like bottled wine
Tasted good for price
Sweet, tasty like glass
Surprisingly good taste
Surprised, Drink was very bubbly, more of a lime soda taste
Surprised Red Robin carried canned wines, the spritzer was light, bubbly refreshing.
Sparkling wine is preferred over dry wine. The dry wine in a can is as if you popped the cork of a new cabernet, then proceeded to drink it right from the bottle. There is a greater atmosphere (air mix and aroma) when (red) poured into a glass compared to right from can.
She liked the fruitiness and it wasn't too strong alcoholically. Would definitely drink again.
Went down easy
Really bubbly -- champagne like
Preferred bottled wine
Poured it from the can to the glass, it was exceptional. For red, articulation and swirl adds to the legs. Whereas the can, you can't expect the wine to have or create the same aroma from the tiny mouth of the can -- it's not possible. glass > can.
I like the name!
Nice -- like that it's in convenience of a can
Loves the Ballocinni Rosé, enjoys the convenience (lack of a glass). Seen as classier than cider.
Liked it but wouldn't buy myself due to suspected high price
It was very convenient/easy at a get-together
It was just like from a bottle but more convenient
It was good, fun for a night out, or concert
It was good, but there was too much sugar. May have been better if was cut with seltzer.
I thought it was good for a summer drink
I love It.
I liked it. Reminded me of Champagne.
I liked it a lot and thought it was easy to use and more easily drinkable at parties w/ less judgement
I liked Infinite Monkey Theorem the most

Great to sneak into no alcohol events
Good, easier than pouring out of a bottle into glasses, good for events.
Good, but not an every-time buy
Good Great idea for tailgates or camping/hiking
Enjoyed the taste
Don't drink wine, but the packaging is cute, if I drank wine I would try it.
Convenient, surprisingly good taste
Convenient
Liked it, convenient. you can enjoy wine without having to open entire bottle
Polka-dot cans were wicked cute" (she posted it on Instagram) good taste, didn't notice difference from bottle
"Boss"
It tasted great
What I like most about it is the convenient glass size
Tasty, easy to carry, more like a soft drink
I liked it
I liked it, tasted like regular wine
It was fine I don't really drink wine
Loved it, convenient
I liked it easy to travel with
It was refreshing and bubbly
I prefer it out of a bottle 99% of the time, but it is great in certain situations. We bought it to take to the beach and it was perfect!
Simpler wines from Trader Joe's were $1 a can and tasted okay!
It was ok, some were quite nice
Sweet and good for on the go.
Convenient and sweet
It's great
These product are cheaper and better to drink

It was good
Like the convenience; perfect amount; taste was good
Ok
It’s okay
The brand that I specifically buy has a wide selection which I really enjoy. These flavors are pinot noir, Rosé and champagne these are easy on the go wines.
Great way to have wine without opening an entire bottle. Quality doesn’t typically match bottled wine so good alternative to cheap wines.
I really liked it! I like that it's portable and makes you feel like you're having a tailgating-style experience even if you don't like the taste of beer. I find that it tasted good, as well!
Like it, convenient
Easy to drink and take, suitable for many conditions

Neutral or Ambivalent Comments
It was OK, I like the mini size and straw concept. Was not crazy about the wine itself.
Good but not better than bottled wine
It was good, but you need to drink a lot to get drunk and they didn't like that esp. for price paid.
Three out of five rating
Underwood -- did not like; Barefoot -- did like
Thought the taste was different
Decent wine for a Merlot, but overpriced and would rather drink in a nicer container for that price. This person drinks lots of boxed wine because it's cheaper.
Good but not great
3/5 rating
It was different –Carbonation
Same as regular wine I don't get the need for cans.
"White trash elegance"
Was not a huge fan. Liked the idea but prefer wine in a glass
Too sweet, but convenient for traveling
It was fine but had the metal/can taste slightly
It was decent! Not the best, but decent.

Sweet but not refreshing enough
It wasn't bad, but I prefer wine from a bottle because there is more.
It's okay, but not as good as the glass bottle one.
Definitely more prominent out on the west coast
More like a soft drink

Negative Comments
Underwood -- did not like it
They were Ok, but I prefer wine out of a bottle.
Was not as good as bottled wine
Not better than beer
Not as good as bottled wine
Sub-par, Not the best, weird aluminum taste
Who wants to drink wine out of a can?
Felt weird drinking wine out of metal
Not great.
Feels pretty weird 😄
I think wine tastes better out of a glass bottle with a cork.

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WIC RESEARCH - PRINCIPALS

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After 20 years as a practitioner in Fortune 50/500 companies, for the last 15 years Dr. Robert Williams has taught Marketing and Business courses, most recently at the AACSB-accredited Sigmund Weis School of Business at Susquehanna University. He has published in peer-reviewed journals, co-authored a textbook (Palgrave Macmillan) and written numerous textbook chapters on marketing and management; as well as presented at international conferences and workshops. His current academic research interests focus on gastro-tourism, competitive advantage, branding, innovation, and wine-in-cans. He is a Partner and Co-founder of Mar-Kadam Associates, a firm that specializes in branding, rebranding, and renaming in service industries and entrepreneurial ventures, GastroGatherings.com (focused on gastro-tourism research and consulting) and WIC Research.com, which is a leader in the wine-in-can market.

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Dr. Helena Williams' current research focuses on gastro-tourism destination branding as an economic driver and has been published in peer reviewed journals, cited, and featured in multiple presentations, including in India (2018), Gran Canaria (2018), Poland (2016), Limerick (2015) and Wales (2015). Her research interests include economic development emerging market entrepreneurship, gastro-tourism, wine & beverage tourism, education, and social services. Previous experience includes research assistant for the Texas Wine Marketing Research Institute, 20 years of entrepreneurial management as President of a state-wide educational training, event and conference-planning firm in Pennsylvania; owner and executive chef at Baltimore's first gastro cafe and gallery; Certificate De Cuisine DE Base, De L"Ecole Le Cordon Bleu, Paris. She is a Partner and Co-founder of Mar-Kadam Associates, a firm that specializes in branding, rebranding, and renaming in service industries and entrepreneurial ventures, GastroGatherings.com (focused on gastro-tourism research and consulting) and WIC Research.com, which is a leader in the wine-in-can market.

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