SHOULD WINERIES INVEST IN CANNED WINES?

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Table Of Contents

Chapter I

INTRODUCTION

While sales of canned wines were insignificant just a few years ago, they are now growing rapidly with sales increasing 62% in 2020 alone. More than 580 wineries have decided to adopt canning into their business models, totaling over 1400 canned wine SKUs (Romano, 2021). Consumers are realizing the convenience of the packaging, sustainability, and portion control benefits among other appeals of canned wine. Many large companies including E. & J. Gallo, and Ste. Michelle Wines have implemented canning to reach a younger demographic that values ready-to-drink beverages. With these industry leaders forging a path in the canned wine sector, other wineries will now be faced with the decision of whether they should can wine to engage with consumers choosing to purchase these new products. While there are financial and branding risks associated with transitioning to canning, this may be a necessary step for wineries to consider to remain competitive in the evolving wine industry.

This paper will evaluate the pros and cons of incorporating canned wine, ultimately addressing the question of whether wineries should decide to invest in this sector. It will investigate current consumer perceptions of canned wine quality as well as possible barriers to entry for interested wineries. Canned wine has been associated with low-quality wine so we will be gauging the extent to which this perception is believed. Investing in the canning process does pose some financial risk to wineries, which we will assess by discussing cost analysis. By evaluating both the financial and reputational risks wineries may face, we aim to determine which types of wineries will be able to benefit from implementing canned wines.

Much of the existing research done surrounding this topic focuses on consumer trends in preferences and packaging. Consumers are leaning towards ready-to-drink beverages and are placing more value on convenience (Nielsen IQ, 2019). The beverage category overall has seen large transitions to canned packaging because of these evolving consumer preferences. In addition, according to some studies, younger consumers are more attracted to personality and innovation in wine brands than previous generations (Elliot and Barth, 2012). Other research focuses on engaging Millennials and Generation Z, instead of attempting to encompass all generations in canned wine consumption. While previous studies give a good background on consumer trends and preferences, they lack a comprehensive analysis of the pros and cons of canning wines for the wineries.

Our study will consider previous research as we evaluate the potential wineries stand to gain through adopting canning. We will also be assessing the market through the eyes of all generations and not just how Millennials and Gen Z's interact with it. In our study, we have interviewed key industry members from wineries with and without canning implemented. We have also surveyed over 500 consumers, as opposed to just Generation Z. Our research has also added a discussion of cost analysis that is lacking in current research to round out our analysis of the benefits for wineries.

The paper proceeds as follows: first, we will provide background on the current state of the wine industry. Next, we will describe our process of gathering data from surveys, interviews, and research. Third, we will analyze the survey, interview, and research results about consumers' feelings towards canned wine. Finally, we will summarize what this means for wineries and marketers and how they can implement this information into their business plans.

Chapter II:

LITERATURE REVIEW

In order to assess if canned wine is a necessary investment for wineries, we must gather more information to get the whole picture. Examining the quality of canned wine, packaging effect on consumer preferences, alcoholic beverage trends, and the current status of canned wine in the market will allow a more thorough review of canned wine's place in the wine industry, and whether it is a good investment for wineries.

Quality of Canned Wine

Many consumers worry that canning wine will have an impact on the taste, quality, and aroma. Some also believe canned wine can lead to a shorter shelf-life, and a decrease in freshness. Although this is a common assumption, there is no evidence to suggest that being canned actually has an effect on the freshness or quality of the wine.

Though many consumers assume canning wine can lead to a "stale" or aluminum taste, studies have proven this to be incorrect. A study done on the packaging of wine asserts why this common misconception occurs: in 1935 there were a few cases of wine that contained mold, but unknown to the public, all the wine in this study (including bottled) contained mold because of a production error. This quickly led to the widespread misconception that canned wine is of lower quality and can contain pollutants (Berti, 1935). Another common misconception of canned wine is that the metal leads to a tin or metallic taste. A study that detected tin content in cans that are sealed by tin concluded there was no tin detected in white canned wine, but typically detected tin content in canned red wine (Molinari et. al, 1987). However, the study contained taste tests proving that a higher percentage of people either preferred canned wine or could not tell a difference.

Although many producers are often concerned that cans can have the potential to acquire strange aromas during storage, a study showed canned wine had less oxygen entering the can from the external environment or the packaging materials than glass bottles (Allison et al., 2020). Since excess oxygen is what leads to this smell, the aroma is proven to be another bias towards canned wine. The same study also showed less oxygen being present in the headspace or dissolved in the wine at the time of packaging because canning operators target smaller oxygen content in the cans.

Another possible objection people may have to canned wine is that it decreases the quality of the wine. In terms of taste, studies also prove aluminum does not change the taste of wine. In a blind tasting of wine in a can versus a bottle, 51.1% of people preferred the wine in the can or found no difference between the two wines (Vigna, 2019).

Packaging Effect on Consumer Preferences

Branding is perhaps the most important factor in a winery's success with it affecting consumer purchase intent and its perceptions of brand personality. With the up and coming cohort of young wine drinkers, specifically millennials, wineries are seeing shifts within the wine market. Significant differences have been identified over a range of work and play behaviors for this new generation and when it comes to branding, millennials are drawn to fun, quirky and outrageous packaging (Elliot and Barth, 2012). Because they have a unique set of tastes and lifestyle choices, they value more innovative packaging and labels that may seem non-traditional. Names such as Blasted Church, Laughing Stock, and Dirty Laundry could be quality wines from reputable producers, but because they are not "traditional," it would signal a different cue from a millennial consumer compared to an older generation consumer (Elliot and Barth, 2012). Among the older generation, "successful" and "charming" were found to be the top two facets correlated with purchase intent which can be seen as traditional characteristics of a wine while spirited and up-to-date were the top two facets amongst millennials (Elliot and Barth, 2012).

The saying “you eat with your eyes” also applies to purchasing products. Appearance and packaging play an important role in influencing consumer perception. Several studies found that strong consumer impressions are based on wine’s packaging design elements when making purchase decisions (Boudreaux and Palmer, 2007; Orth and Malkewitz, 2006).

Today, more consumers are on the go and with that, wine packaging is evolving. Places where they may want to drink such as parks, beaches, and pools do not typically allow glass packaging. With canned wine, wine is more accessible and portable, making it easier to just throw in a bag before your outing where glass is prohibited (Swartz, 2019). As you can imagine, an aluminum can is much lighter than a glass bottle. Consumers are also wanting smaller or single-serve options that canned wine provides for them. Instead of lugging around a 750ml glass bottle of wine that they probably would not finish, consumers are able to bring a 250ml can of wine that they can finish in one sitting.

Along with the smaller portions, canned wine comes in, it also appeals to the younger, more environmentally conscious generation because aluminum cans are easier to recycle than bottles. The cans are also lighter to ship, requiring fewer packing materials. Carbon footprints created by wine bottles, especially when accounting for their transportation from producer to wholesaler to retailer to consumer, are becoming more unappealing to some wine drinkers (Swartz, 2019).

Alcoholic Beverage Trends

The alcoholic beverage industry is a broad, evolving sector that is greatly affected by ever-changing consumer preferences. A trend towards ready-to-drink beverages has greatly increased as consumers are placing more value on convenience than ever before. Single-serving packaging is also growing in popularity as consumers are wanting drinks they can take on the go and fit their active lifestyles (Nielsen, 2021). There has also been a trend toward e-commerce for alcoholic beverages with companies like Drizly and Instacart expanding this market. This is largely a result of the pandemic as the two main channels for wineries, restaurants, and tasting rooms, were shut down (Mcmillan, 2021). Consumers have now become more comfortable with online alcohol purchases and have moved towards home consumption, making off-premise channels increasingly profitable (IWSR, 2021). The pandemic also resulted in an alcohol consumption increase overall as off-premise sales increased 54% between March 1st and April 18th, 2020 (Grossman et al., 2020).

Trends come and go, but it is important to understand the basis of consumers' desires to learn how to better meet their needs. The values and preferences of consumers vary largely based on generation. Younger consumers (21-40) prefer spirits over wine and beer (Taylor, 2018). Although wine is not at the top of their lists, 81% say that wine is “fun” and 83% said “delicious" (Thach, 2019). They tend to connect with brands that fit their lifestyle and stand for something important (MaketCast, 2019). However, Gen Z is drinking less than other generations and 20% less per capita than Millennials (Taylor, 2018).

Younger consumers place a large importance on brand personality when it comes to consumption. They tend to value fun, bold branding, and innovative packaging. They value creativity and tend to purchase alcohol that captures this in some way. They also place more importance on brands standing for causes or social issues than older generations (Elliot and Barth, 2012). 41% of Millennials prefer spirits over other alcoholic beverages. Beer is close behind at 39% and 20% of millennials prefer wine (Breakthru Beverage Group, 2018).

Older generations (40+) are more likely to purchase alcohol because of their established taste, not necessarily trends. Gen X consumers especially, value authenticity and intimate experiences when it comes to purchasing alcohol. They are extremely brand loyal which is more unique to this generation (Newhart, 2019). Baby boomers, however, are less likely to be attracted to variety and experimentation. Their alcohol purchases are often price-driven more than taste. They are also more likely to consume alcohol at home (Convenience Store News, 2016).

Wine specifically has its own set of trends and preferences. The most commonly purchased red wines in the United States are Merlot, Cabernet Sauvignon, Pinot Noir, and Zinfandel. The most popular whites are Moscato, Chardonnay, Resiling, Pinot Grigio, and Sauvignon Blanc. Two-thirds of American wine drinkers say that price is one of the most important factors in choosing wine. Of surveyed consumers, 36% say that brand is something they consider and 24% say they care about the alcohol percentage. When purchasing wine, 62% of Americans prefer to spend under $20 and over 57% of wine drinkers do not feel confident in their ability to distinguish cheap versus expensive wine (Ballard, 2019).

In 2020 Gen Z accounted for 3% of wine consumption, Millennials were 18%, Gen X was 35% and Boomers were 37% (Willcox, 2020). Gen Z prefers white wines the most but reds are a close second. Millennials and older tend to prefer red wines. When Gen Z was surveyed about how they believe the wine industry should market better towards them, the most frequent responses were online advertising, packaging, and design (Ballard, 2019).

Current Status of Canned Wine in the Market

Before looking at the current status of canned wine within the alcoholic beverage industry, it is important to note the history. Experimentation with wine in a can was introduced at the same time beer in a can was introduced. This took place in 1935, however, canned wine did not gain traction as canned beer eventually did (International Canned Wine Competition, 2018). Many short-lived attempts failed to take a notable hold in the industry, that is, until 2013 when the Underwood line of canned wines from the Union Wine Company in Oregon was released (International Canned Wine Competition, 2018). Since then, they have grown to be a leader in the canned wine field, paving a way for canned wines to become popular enough among consumers and producers that for the first time it is considered to be more than a "trend."

As wine in a can grows in popularity, more studies are being done to evaluate the industry and whether or not canned wine has a place in it. The canned wine category quadrupled in 2016 and grew by another 27% in 2017. These numbers were based on sales from grocery, drug stores, mass merchants, club stores, dollar stores, military commissaries, liquor stores, and convenience stores (Springer, 2017). Continuing to show growth from 2018 to 2019, canned wine sales rose 69%, totaling $79.3 million by June 15th of 2019 (Williams, 2019). Although these numbers sound significant, in 2018 canned wine only made up 0.2% of all yearly wine sales, with glass bottles making up 73% nationally (Concepcion, 2018). This data shows that although it has the smallest market share, canned wine is growing fast.

This shows a significant contrast to the U.S. wine market as a whole, which has shown notably slower growth in the last few years, with an average 1.5-4% growth since 2014 (WIC Research, 2019). Larger wineries are beginning to take notice of this. Four out of the top five largest wineries have incorporated canning into their business as of now. These include E&J Gallo, The Wine Group, Constellation Brands, and Treasury Wine (WIC Research, 2018). Smaller and younger wineries are dealing with cost-to-income disparity with the decision of canning their wine. To purchase and install a small canning production line would cost about $25,000-$35,000, which many do not have available (WIC Research, 2018).

With some aspects holding wineries back from incorporating canned wine into their businesses, there are still things needing to be done to make canned wine significant in the wine industry. Beyond the studies measuring canned wine, no studies are focusing on whether or not the adoption of canned wine into wineries businesses is a good decision.

Survey Methods

The 2015 American Wine Preference Study utilized thorough consumer surveying. Sonoma State University partnered with Survey Sampling International to collect household data of wine drinkers throughout the United States. They collected data from 1072 wine consumers 59% of which were females and 41% male. All 50 states were represented in this research as well as multiple age groups. “Younger Millennials” made up 27%, 29% were “Older Millennials", 23% were Gen X, and 21% were Baby boomers. The ethnicity was less varied with 65% being Caucasian and Hispanic, African-American, and Asian being represented by 13%, 11%, and 11% respectively. About 60% of participants were college-educated and around half were married (Thach, 2015).

They surveyed participants on a wide variety of topics to gather comprehensive data. They asked questions about wine drinking frequency as well as favorite varieties. They included questions about style (fruity, smooth, sweet, etc.) to gain a broader understanding of the basis of these preferences. They incorporated a section on why the participants drink wine and included a variety of options to choose from. They also presented participants with 13 different aspects of wine that affect purchasing decisions and asked them about their preferences. The survey also contained a section dedicated to figuring out where they buy most of their wines as well as wine region destinations they travel to most.

This survey does a great job of collecting a large sample size from diverse backgrounds. They have many different types of people represented from various ages and demographic groups. This sets up the survey to have greater credibility. The questions the survey asks are thorough and cover multiple facets of wine consumption preferences. They give all possible options when providing multiple-choice questions to ensure accurate and comprehensive results. This survey is relevant to how we will conduct our's based on their thoroughness and surveying method. Another great aspect of this survey is the ability to replicate the conditions of previous surveys or get very close. This survey is "conducted every few years by researchers at Sonoma State University's Wine Business Institute" (Thach and Camillo, 2018).

In addition to conducting a very representative survey, the Sonoma State University's Wine Business Institute also includes graphs and other visual representations of the data collected from their survey, making it extremely easy to read and utilize. The end of the surveyed data also includes a summary and conclusion, which analyzes the data collected from consumers and the wine market.

Interview Method

To analyze canned wines' place in the market, those collecting data have interviewed wineries and consumers through various ways, such as an interview format, over the phone, on zoom, or in person. The Union Wine Company, a leader in the fast-growing canned wine segment, was interviewed in an attempt to get a better understanding of how businesses are modernizing by adding canned wine to their business. The Union Wine Company produces the canned wine, Underwood, which was the main focus of the questions.

The first question asked was what their primary method of packaging was and the results were 65% can and 35% bottle (Held, 2020). With aluminum cans dominating their market, it allows for their cost to go down because cans are less expensive to produce than glass by about 30% (Held, 2020). They also discussed certain demographics concerning the packaging. They found that Underwood is attempting to target females with mid-range income. This is due to data showing that females are the ones who mainly do the grocery shopping for their household, especially for wine. Since Underwood is mainly sold through grocery stores, larger wine shops, and liquor stores they want to appeal to female consumers. They also focus on consumers whose interests range from the outdoors, van life, young parents, extreme sports, and creative foodies. Canned wine is perfect for these people's lifestyles because of its portability and accessibility.

Chapter III:

METHODOLOGY

To complete our project based on whether or not wineries should invest in implementing canned wine, we needed to collect data from various sources. This includes analyzing quantitative data from real-life consumers through a survey, journals, online articles, and interviews with diverse wineries. To gain knowledge and insight from the survey, we have also analyzed the results, examining correlations and possible causation amongst various factors including age and gender.

Procedures for Data Collection

We used an article written by Paul Vigna, the enterprise manager for PennLive. The article discusses the first blind tasting of wine in a can versus in a bottle. It focuses on the East Coast, but uses wines from various regions across the United States, making it applicable to wineries all over. With a test that included participants ages 21-74 and featured over 200 wines, they evaluated the taste quality of canned wine (Vigna, 2019). By taking away the participants' ability to see the packaging, they were able to get unbiased opinions of how the wine tasted.

Our analysis also utilized a research project by Spencer Held that looks at how to solve the problem of engaging younger generations in the wine industry. The paper argues that canned wines will be successful in marketing to Millennial and Gen Z generations. They gathered data from 275 consumers about their preferences on sustainability, cost, innovation, and other consumer issues. In the end, their research found that consumption patterns surrounding wine are changing. They found that canned wine aligns with the core values of Millennial and Gen Z demographics and ultimately is a great way to engage with them (Held, 2020).

Using data from the website *The Equipped Brewer*, we looked at the costs of canning wine. The rundown of the pricing model includes the cost of filling cans, cost of cans, cost of printing or shrink sleeves, lids, pack-out materials, and the freshness date stamping. We then used this to assess if the total cost is worth the investment for various sized wineries by talking with industry members.

To obtain data for assessing the general population's perceptions of canned wine, we generated a survey through Qualtrics. Since we are answering if wineries would benefit from investing in the canning of their wines, we needed to assess how consumers are currently perceiving canned wine as well as their current interactions with it.

The survey began with prefacing questions about age, gender, and overall preference for alcohol consumption to gain background information about the participants. This included questions about their preference for wine varieties and frequency of purchase. To assess their current perception of canned wine we asked them to choose words that they associate with canned wine from a list. The word list contained both negative and positive words describing attributes such as quality, taste, convenience, etc. Those that selected that they do not drink wine were further questioned about their reasons for this.

Another important aspect of canned wine is its pre-portioned size. We wanted to evaluate how many people could benefit from this feature by asking how often they have to waste wine because they did not finish it and it had gone bad. To cover the topic of convenience, we asked them about where they usually take wine and how often they decide to drink something else because of various inconveniences that come with drinking wine out of a bottle. At the end of the survey, we set up a two-version randomized question. One version discussed the benefits of canned wine and then asked how likely they are to purchase it. The other version asks how likely they are to purchase it without the added list of benefits. With these questions, we have been able to see if the lack of knowledge about this product is a factor in their current interactions with canned wine. This gives wineries looking to incorporate canning important information about how to market canned wine to make it successful. This also gives us an idea of if people who are more aware of the benefits are more likely to purchase canned wine. Overall these questions assess the current wine habits of multiple generations which will give us important insight into the consumer preferences and ultimately give us an idea if there is a place for canned wine in the marketplace.

To reach various demographics we utilized different platforms to find participants. The survey was sent out to club group chats and the Cal Poly student Facebook pages. We have also attempted to reach older consumer groups through the Cal Poly Parent Facebook page, the Nextdoor app, and by sending it to family members.

To gather data from wineries and winemakers about their packaging preferences, we also designed interview questions. First, we researched both wineries that currently do and do not can their wines. As part of our research collection, we also attempted to get a mix of smaller and larger wineries, knowing that the smaller wineries may have fewer incentives and resources. To do so, we reached out via email to set up interview times with several different companies. One company we interviewed that currently cans their wine is Union Wine Company, which produces over 550,000 cases of wine a year. We also interviewed Biddle Ranch Winery, a smaller company that does not can its wine. Another company, Field Recordings produces both wine coolers and bottled wine and used to have a larger canning program. By interviewing these companies of various canning engagements, we gained knowledge from industry professionals' perspectives about the potential of canned wine in the wine industry.

We set up interviews via zoom, where we asked each winery about ten questions, about both the challenges and advantages of canning wine. In each interview, we asked the same preface questions and opened up the floor to the companies to share any other factors that may have influenced their decision whether to can wine. One of the questions we asked wineries that can wine was: What kind of financial gain or loss have you seen by implementing the use of cans? Another question we had for companies was: Have you seen a change in your consumer demographic since you have implemented cans? For the wineries that do not can wine, we have asked what their reservations are about canning wines and if they have ever considered it.

Procedures for Data Analysis

To analyze data collected from interviews with wineries, two to four of our team members have been present when we conducted the interviews. We began each interview by asking whether or not we can record the session. One of our teammates was designated to take separate notes throughout the entirety of the interview. Then, at least one of our teammates asked questions and conversed with the interviewee. Once each interview had concluded, we looked over the collected notes and combined them into one sheet so we can easily reference them. After completing all interviews, we rewatched the recorded interviews and took note of anything we might have missed. As a group, we discussed the feedback we had received. When doing this we focused on the advantages and disadvantages they see, not only with their own winery but the industry as a whole. This helped us get a better idea of whether or not wineries are open to the idea of canned wine, as well as how it has affected wineries that have already adopted the method.

Through the survey method of gathering data with the Qualtrics online-based survey tool, we received responses from over 500 participants. Qualtrics compiled all the responses into easy to read data. We took this data and analyzed it by looking at the quantitative results and developing a better idea of where different age groups stood on the use and distribution of canned wine. Our main focus when looking at the participants' responses was to assess whether or not the added benefits would persuade consumers to purchase canned wine. We reviewed their answers to these specific questions focused on the benefits, analyzed if they made a difference to consumers, and found which age group they mattered to the most. We heavily considered the participants' responses to decide whether or not wineries should invest in the canning of their wine.

Chapter IV

RESULTS, CONCLUSIONS, AND RECOMMENDATIONS

Results

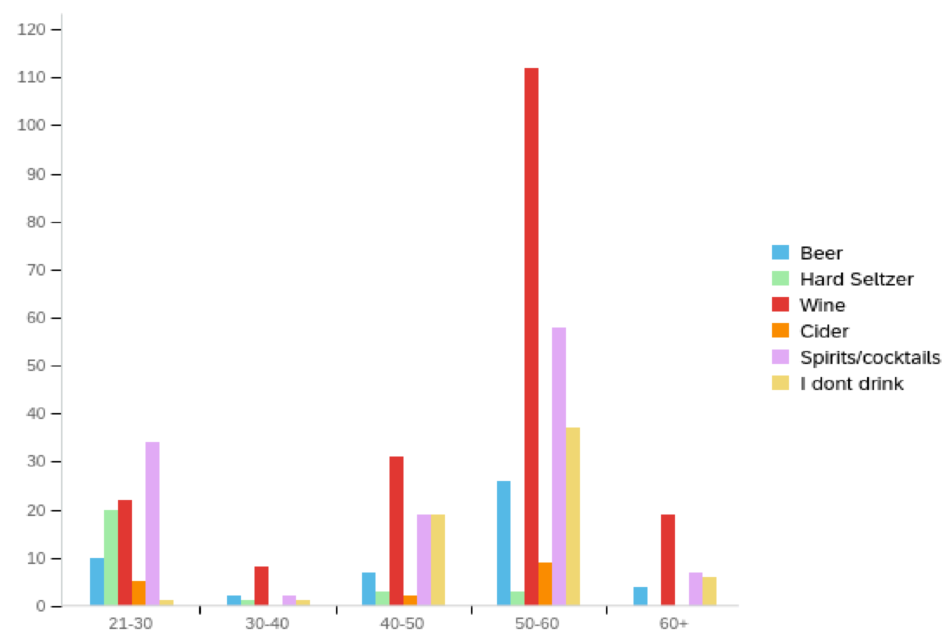
To answer the question of whether or not canned wine is a good business decision for wineries, we collected data by sending out a survey as well as interviewing wineries to receive their first-hand insight into the industry. The survey was made available for approximately 3 weeks. Within this period we received 510 responses, 491 being usable due to 19 respondents being under 21. Of those responses, 86.72% were female and 12.63% were male, while the remaining 0.65% preferred not to say. The age groups included under 21, 21-30, 30-40, 40-50, 50-60, and 60+. The three age groups that received the most responses were 21-30 at 18.49%, 40-50 at 16.9%, and 50-60 at 51.09%. There were a total of 20 questions changed based on previous responses. Question number 1 asked the respondent their age group. The survey was sent out to various Cal Poly sorority group chats, Facebook groups, friends and family, and the Nextdoor App.

For the interview segment of our data collection, we received responses from three wineries. These wineries included Union Wine Co., Biddle Ranch, and Field Recordings. From Union Wine Co. we interviewed Amy Carr, Meredith Mcgough, and Alexandra Scharpnick. Amy is the logistics compliance and customer supervisor, Meredith is one of the winemakers at the company, and Alexandra deals with shipping as well as hospitality coordinating. With Biddle Ranch, we interviewed Leigh Woolpert, the General Manager, and from Field Recordings, we interviewed Tim Fulnecky, an assistant winemaker. Each winery had a different experience with canning wine. Union Wine Co. is one of the leaders in the wine industry with canning their wines, Biddle Ranch does not can their wine at all, and Field Recordings used to can their wine but now only can wine spritzers. Each interview was scheduled for thirty minutes and we asked each interviewee a range of 10-15 questions.

Drinking Preferences

When given the choice between beer, hard seltzer, wine, cider, spirit/cocktails, and an "I don't drink" option, the overall beverage of choice was wine with spirit/cocktails following close behind as seen in Figure 2. To further analyze these results we split the data with results from the 21 to 40 age group and the 40+ age group. Among the 21 to 40 years old who would be considered Gen Z and Millennials, spirit/cocktails were the most popular with wine coming up next and then hard seltzers. Out of the 40+ years old respondents, wine was the favored beverage followed by spirits/cocktails and then the "I don't drink" option. We also wanted to investigate if the results would change based on gender. When doing this we found that females preferred wine and spirit/cocktails while males preferred beer and wine.

Figure 2: Alcoholic Beverage Choice By Age Group



When asked how frequently they drink wine, 45% said they drank wine occasionally (a couple of times a month) and 24% said they drank wine frequently (3-4 times a week). The results based on age and gender varied slightly in percentage, but overall, still indicated that most respondents drink wine occasionally. This demonstrates that regardless of age or gender, there is a demand for wine in the market. For people who drink wine, 70% consume about 1 to 2 glasses of wine. It showed that this response was the same across all age and gender groups. These responses indicate that the serving size of a can of wine would be ideal for most people because they could open one or two cans of wine instead of having to open an entire bottle and have to waste the rest or find someone else to share it with.

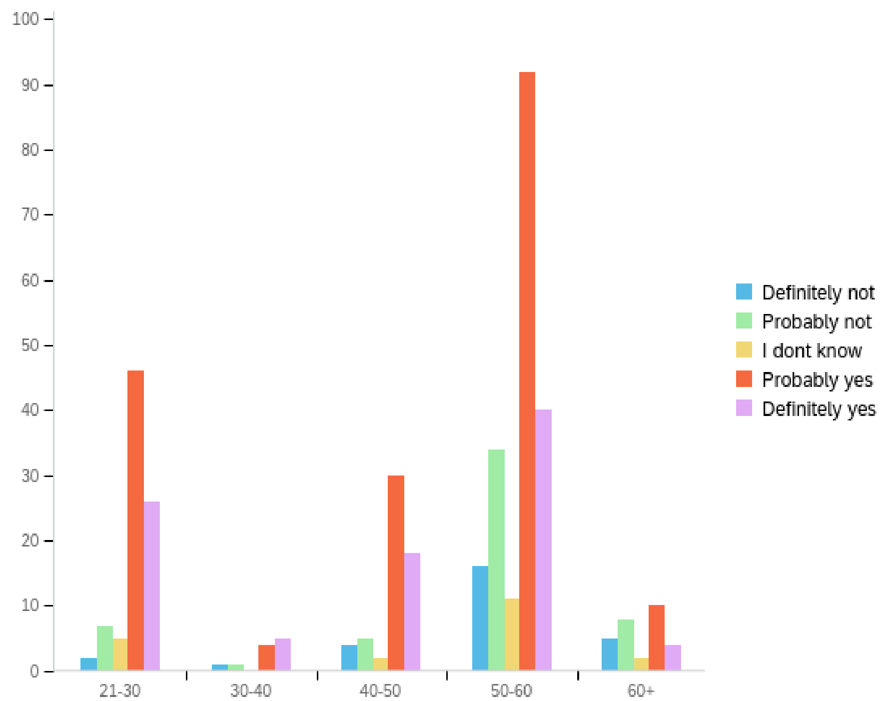
Another question was aimed to see what type of wine consumers buy most frequently. Our survey's results showed that overall, red wine was the most common. While both males and females favored red wine, it is important to notice that about 72% of males preferred red wine while only 50% of females preferred red wine. Similarly, the younger generation and older generation both selected red wine as their most purchased wine and white as their second.

To understand consumer priorities when purchasing wine, we asked them to rank them in order of most important to least important. These priorities included: quality, price, brand reputation, and packaging. Overall the quality of the wine was the most important with brand reputation following. For people in the 21-40 age group, the price was by far the most important with 64% of them ranking it first. With the 40+ age groups, only 24% of them ranked price as the most important while 65% of them said quality is what they look for when purchasing wine. The older generation most likely has a more stable income and has acquired the taste for distinguishing high from low-quality wine.

Problems with Wine

As part of our survey of over 500 people, we analyzed problems consumers may have with wine. We asked consumers an array of questions about potential issues with wine, including waste, portability, convenience, and attributes they did not enjoy about wine. In our survey, we found that about 9% of people frequently dump out an open bottle of wine. This number stayed steady across all age groups and genders, except for the over 60 demographic. In the over 60 age group, this number increased to about 13%. We also found that about 77% of people answered they most likely have chosen to drink another beverage over wine because of convenience, as shown in Figure 3 below. Interestingly enough, 66% of the 60+ age group answered yes to the same question, remaining consistent with a higher preference for wine than other age categories. Overall, we found that people are typically deterred from wine because of restrictions on glass use in some areas, inconvenience to open a wine bottle, and/or the lack of portability of a wine bottle. The age group that this affects the most is the 40+ year-olds because the group had the most responses for attributes stopping them from drinking bottled wine. In males, we found that they had chosen to drink another beverage instead of wine 74% of the time due to inconvenience.

Figure 3: Responses to "Have you ever decided to drink another beverage over wine because of convenience issues?" by age



One problem that canned wine does not address is the consumers who do not drink wine. From the group of people who chose to not drink wine, every member of the 21-40 age group cited the taste as their reasoning for not drinking wine. This provides a problem that canned wine can not address, as these people will continuously choose other beverages over canned wine, despite the different packaging.

Interactions with Canned Wine

We surveyed participants on several questions revolving around their perceptions, interactions, and experience with canned wine. About 34% of all of our participants had purchased canned wine before while 66% had not. Slightly more of the Gen Z and Millennial consumers indicated that they have purchased canned wine as opposed to the older generations. These results show that wine in a can catches the eye of younger consumers more so than older consumers as it appeals to their more adventurous and bold consumer habits. According to our t-test, our low p-value provides support for our hypothesis that younger consumers are more likely to purchase canned wine. These responses also varied greatly based on gender as 81% of men said no to having purchased canned wine before, but only 62% of women said no. After conducting a t-test using survey response data from men and women, we were also able to conclude there is a statistically significant difference between the two groups' preferences. Of those who answered yes, 61% said that they were either somewhat likely or extremely likely to purchase it again, showing that a majority of people liked their experience of canned wine and would further support the industry. This response seemed to be the same across all generations, as they were equally as likely to purchase it again.

To test the consumers' perceptions of canned wine, we provided a list of both positive and negative attributes of canned wine and asked them to choose the words they associated with canned wine. The top three selected words overall were "convenient", "cheap", and "portable" which were all positive options. Of the negative options, the most frequent responses were "low quality," "sugary," and "aluminum taste." Out of the people who have tried canned wines, the top answers were "convenient," "portable," and "easy to open." About 16% of people who had not tried canned wine listed that they perceived it as "low quality", however only 6% of people who had tried it said that it was "low quality". This shows that consumers changed their minds about the quality after actually trying the product, revealing that lack of experience or knowledge is a barrier to consumers' purchases of this product. Participants most frequently chose positive words that had to do with convenience, ease of use, and portability showing that this is what stands out to consumers.

At the end of the survey, we asked a question that had two versions. One version simply asked participants how likely they are to purchase canned wine. The other listed out the benefits of drinking canned wine and then asked the same question. From these questions, we were able to see if lack of knowledge or experience with canned wine is a reason why they have not purchased it. Our results showed that 43% of the participants presented with the benefits selected either “somewhat likely” or “extremely likely” to purchase again (Figure 4a). Only 28% of people who were just asked the question had the same responses (Figure 4b). This indicates that many consumers do not know enough about canned wine and would benefit from samples, or experience of the product in some way. They would be responsive to marketing discussing these benefits as these are all things that are important to them.

Figure 4a: How Likely Participants Are to Purchase Canned Wine, Benefits Presented

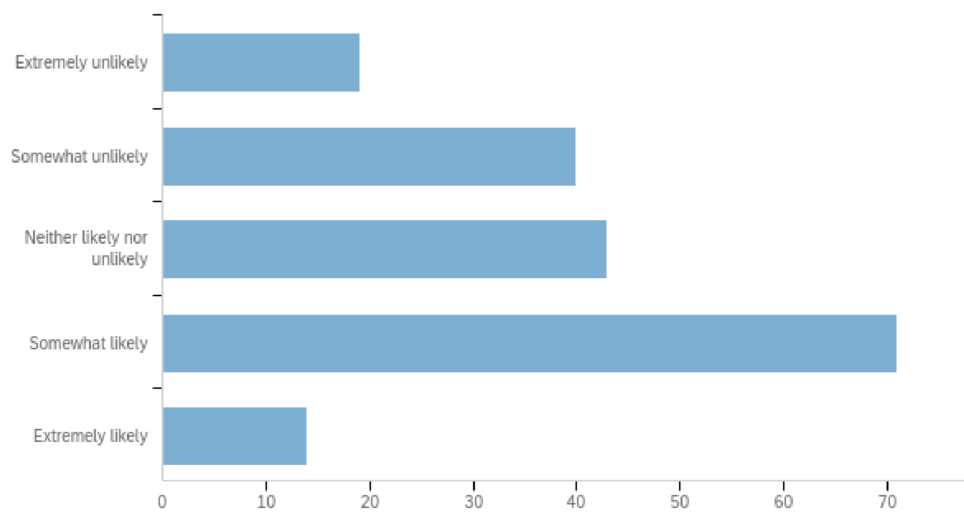
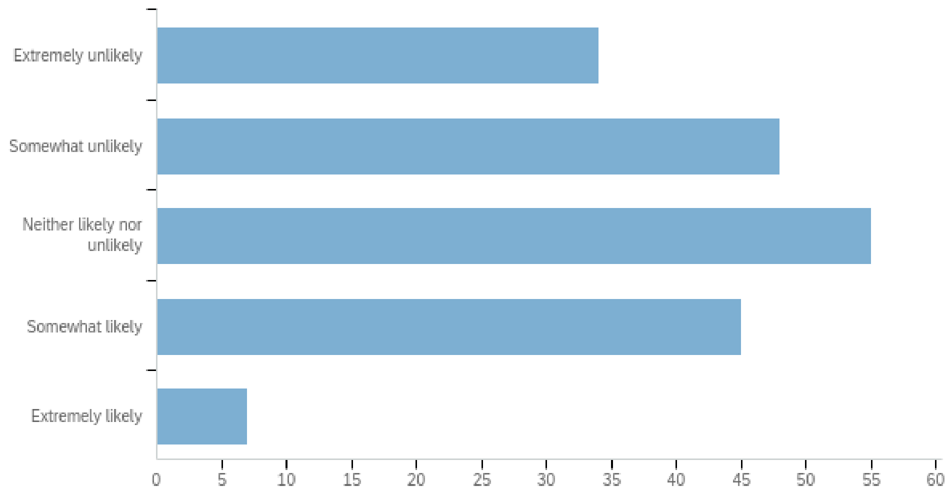


Figure 4b: How Likely Participants Are to Purchase Canned Wine, No Benefits Presented



For people who said that they were unlikely to purchase in either version of the question, we offered a free-response question to see why they were still unlikely to and what would change their minds. About 28% of the responses had to do with concerns of aluminum taste or just taste in general. Another 33% were concerned about the quality and said that the bottle will produce better quality than a can. An additional 17% stated that they are unlikely to purchase cans because of their "old school" ways and are stuck in their habits. The last 5% of people said that they do not know enough about it, do not know where to buy it, or have not tried it yet. When we asked people if anything would change their mind about answering no, some suggestions were: if their favorite brand started producing cans, if they tried a good canned wine, or if they were recommended a great canned wine to try.

Biddle Ranch Winery Interview

Biddle Ranch is a winery located in the Edna Valley. They are a newer winery bought in 2012, and more recently opened their tasting room in 2016. Talking to Leigh Woolpert, who has been the general manager since 2016, we discovered that they are a smaller scale winery, producing about 3500 to 4000 cases annually. They currently are targeting younger individuals who have disposable income, ranging from 28-50 years of age. However, they try to stay open as an option to any possible consumer.

When asked what knowledge she had on canned wine, Woolpert stated that she had tried it before and had had great wine in a can and not so great wine in a can. She also stated that it is cheaper and attracts a different type of market, not necessarily one that Biddle Ranch is focused on. Moving forward, we discussed whether or not Biddle Ranch has considered canning their wine and if that is even a feasible option for them. Woolpert pointed out that 95% of their sales are to their wine club or within their tasting room, so dealing with this as well as them still being a small-scaled winery, they have not considered implementing canning wine into their business. We also discussed whether or not canned wine is going to be a trend. Woolpert noted that although she does not think it is going to go away as a trend would, it likely will not grow much more than it is now. Woolpert pointed out that canned wine is mostly being sold within grocery stores and restaurants, and since they are small-scale, they aren’t using that as a channel to sell their wine.

Field Recordings Winery Interview

The second interview we conducted was with Tim Fulnecky, the assistant winemaker, at Field Recordings Winery. Fulnecky had just finished his 7th harvest with Field Recordings and had been working there for almost 6.5 years. They are a medium-sized winery, producing roughly 50,000 cases annually. They source their fruit from various places in California, mainly on the Central Coast, and their tasting room is located in Paso Robles.

Asking similar questions that we did in the interview with Biddle Ranch, we were able to get a different perspective on canned wine from a slightly larger winery's view. Fulnecky estimated that about 80% of their wine is sold through distribution, however, their wine club is growing. Their target audience is similar to Biddle Ranch because they are targeting younger individuals who have disposable income, however, they are a bit more focused with the age ranging mainly from 25 to 35. When asked about canned wine, Fulnecky stated that they had previously canned their wine. They were one of the first wineries in California to put still wine in a can. However, now they only do it on a smaller scale with wine spritzers. Fulnecky discussed some issues they had while canning wine and why it is no longer a significant part of their business. There were supply chain issues, due to canning companies not caring about selling a small number of cans to a small company when companies, such as Coca-Cola, will buy much larger amounts at once. It is not always cost-efficient. When asked whether or not canned wine is going to just be a trend, Fulnecky said that since they started canning sales had gradually grown each year, so he believes it is past being a trend and it is here to stay. However, he does believe that wineries putting expensive wines into cans is a trend because that's not what cans are meant for. His point of view was similar to Woolperts from Biddle Ranch in the fact that canned wine likely will not grow to be more than what it is now. Lastly, Fulnecky's ending remarks were that he "personally hated it" when the company he works for was canning their wine, he stated that it was a lot harder than bottling, the packaging process was much more oxidative, and there were just more worries in general.

Union Wine Company Interview

The third interview we conducted was with Union Wine Co. who produces approximately 550,000 9L cases annually. They were the first mover and now are one of the leading wineries who can their wine. For this interview, we were able to talk with three Union Wine Co. employees: Amy Carr, Meredith Mcgrough, and Alexandra Scharpnick. Amy is the logistics compliance and customer supervisor, Meredith is one of the winemakers at the company, and Alexandra deals with shipping as well as hospitality coordinating.

The questions for this interview varied slightly from the previous two because they are a much larger company and focus more on the canned segment of their business. The company is based in Oregon, right outside of Portland, where individuals commonly take part in outdoor activities, which was a large motivator for them to put their wine in a can. When asked about their target audience they stated that it is predominantly adventure-driven individuals, not necessarily a certain age group. However, they have worked very hard to make it more accessible and affordable to consumers by decreasing barriers, which has broadened their target audience more than wine in a bottle would usually have. One common barrier they have addressed with canned wine is the lack of confidence consumers feel in their knowledge of wine.

They also noted that having wine in a can is beneficial because, in many places before, such as music festivals or sports games, they were unable to serve wine. Furthermore, one major fear or initial barrier that had to be worked through was sizing standards for cans. They originally had to import cans to legally can their wine in the United States. However, recently there has been a new rule published for the standard of fill by the TTB that allows 355 mL, 250 mL, and 200 mL for wine. In addition, dealing with freight and working with distributors are also big issues. Despite these, Union Wine Co. has had significant benefits of revenue gains since starting to can their wine. Amy stated that they can save thousands when comparing the costs of one truckload of canned wine versus bottled wine. Packaging materials costs for cans are roughly twenty times less than bottle wine. Overall, Union Wine Co. has greatly benefited from implementing the cans into their business.

Conclusion

Through speaking with industry professionals, implementing consumer surveys, and analyzing financial data, we determined canning wine is only feasible for certain wineries. Wineries or companies we would suggest canning as a viable option are only wineries that have the means to acquire or rent a canning line or larger wineries that plan on incorporating canning for the long-term. According to our interviews with professionals from Union Wine Company and Field Recordings, implementing canning is also typically more successful with brands who are targeting younger adults (about 25-35 years old) with disposable income. Brands that are also targeting outdoorsy or adventurous consumers would be more successful with canning their products. Our results show that 79% of respondents say they occasionally or frequently choose to bring wine with them on an adventure. By canning wine, wineries could alleviate the inconveniences of bringing along a bottle, thus opening up their product to a whole new demographic. These demographics are better reached through canned wine because of the convenience and portability of canned wine.

According to our research, canning wine for a limited or seasonal edition would be unprofitable because of the financial and time commitment canning requires. Choosing to can wine will need to be a long-term decision for it to become profitable as there are high entry costs that will need time before returning on the investment. Tim Fulnecky notes that canning companies are much more likely to prioritize larger clients who place massive orders. If a company is dedicated and wants to make canning a large portion of the business, they will have better luck succeeding.

To wineries with relatively smaller production or one that has only devoted a small part of their production to canning, we would not recommend canning wines. Canning costs and buying cans in bulk become less expensive the more you produce. Therefore, it is more profitable the more cans you are producing. Another winery type we would not recommend to can their wine would be very upscale and prestigious wineries because canning is not typically successful with their typical target consumers, and canning wine can also damage the wine when attempting to age the wine like many high-end consumers tend to do. As Tim Fulnecky put it, people will never be connoisseurs of canned wine.

Limitations

Although we collected in-depth data, with over 500 survey responses and interviews with a variety of wineries, there were some limitations we ran into. Our survey results were limited to the Cal Poly community, mainly in San Luis Obispo. The wineries whom we interviewed were also limited to the West Coast. Two of the three were located in San Luis Obispo County, while the other was located outside of Portland, Oregon. In addition, there was a surplus in respondents who were ages 50 to 60, leaving other age groups underrepresented. This was especially true for the age range 30 to 40, which only accounted for 2.85% of respondents. Males were also underrepresented in all age groups, accounting for 12.55% of total respondents. Another limitation we ran into was failing to ask the income range of respondents of the survey. Lastly, survey questions, in general, do not treat each respondent as an individual, which decreased the quality of data we received back. It was also limited in assuming all respondents have access to wine or care at all about wine.

Possible Extensions

Some possible recommendations in pursuit of further research include: conducting blind taste tests, meeting with more wineries for interviews, and a deeper assessment of cost analysis. It would be beneficial to do an in-person blind taste test comparing canned and bottled wines. This would allow for individuals to answer questions based on physical experience and decrease the number of respondents who are uninterested in wine in all aspects, creating higher quality feedback. Meeting with more wineries and going more in-depth into the cost analysis based on their business models is another way future research could benefit. It would also be useful to interview a greater variety of wineries, including more wineries from other states in the United States, mainly the East Coast, or even wineries abroad. It may also be worthwhile if a future survey was distributed with more focus on aiming to get an equal percentage of each age group, gender group, and income range group for greater representation.

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Appendix

Qualtrics Survey Questions

1. How old are you?
    a. Under 21
    b. 21-30
    c. 30-40
    d. 40-50
    e. 50-60
    f. 60+
2. What is your gender?
    a. Male
    b. Female
    c. Non-binary/third gender
    d. Prefer not to say
3. What is your alcoholic beverage of choice
    a. Beer
    b. Hard Seltzer
    c. Wine
    d. Cider
    e. Spirits/cocktails
    f. I do not drink
4. How frequently do you drink wine?
    a. Never
    b. Rarely (less than once a month)
    c. Occasionally (2-3 times a month)
    d. Frequently (3-4 times/week)
    e. Always (almost every day)
5. Why don't you drink wine? (select all that apply)
    a. I don't like it
    b. It's too expensive
    c. I don't know enough about it
    d. It's inconvenient
    e. Other
6. What type of wine do you buy most frequently?
    a. White
    b. Red
    c. Rose
    d. Sparkling
    e. None of the above/ I do not drink wine
7. When you do drink wine, how much do you consume (to yourself)

a. ½ glass
b. 1-2 glasses
c. 3-4 glasses
d. A full bottle (5 glasses)
e. More

8. What type of packaging do you buy wine in most frequently?
    a. Boxed
    b. Bottled
    c. Canned
    d. Growler style (wine keg)
9. What is most important to you when purchasing wine? (rank in order of importance, 1 being most important and 5 being least)
    a. Quality
    b. Price
    c. Brand Reputation
    d. Packaging
10. Have you purchased canned wine before?
    a. Yes
    b. Maybe/ I do not know
    c. No
11. How likely are you to purchase it again?
    a. Extremely unlikely
    b. Somewhat unlikely
    c. Neither likely nor unlikely
    d. Somewhat likely
    e. Extremely likely
12. Which of the following do you associate with canned wine? (check all that apply)
    a. Fun
    b. Expensive
    c. High quality
    d. Convenient
    e. Cheap
    f. Sugary
    g. Inconvenient
    h. Low quality
    i. Portable
    j. Aluminum taste
    k. Worse hangover
    l. Portion control
    m. Fresh

n. Easy to open

13. How often do you dump out an opened bottle of wine because it has gone bad?
    a. Frequently
    b. Occasionally
    c. Never
14. How often do you take wine outside of the house? (ie. beach, camping, etc)
    a. Frequently
    b. Occasionally
    c. Never
15. Have you ever decided to drink another beverage over wine because of convenience (ex. Ready to drink beverages)
    a. Definitely not
    b. Probably not
    c. I do not know
    d. Probably yes
    e. Definitely yes
16. Which of these attributes of bottled wine have stopped you from drinking it? (check all that apply)
    a. Portability
    b. Inconvenience of opening
    c. Price
    d. Portion size
    e. Inability to use glass
    f. None of the above
17. How likely are you to purchase canned wine over bottled in the future?
    a. Extremely unlikely
    b. Somewhat unlikely
    c. Neither likely nor unlikely
    d. Somewhat likely
    e. Extremely likely
18. Many consumers feel that canned wine is often more affordable and more convenient for on the go. It is easier to open, and pre-portioned for consumers. Cans are also easier to recycle than bottles and therefore more environmentally friendly. Given this information, how likely are you to try canned wine?
    a. Extremely unlikely
    b. Somewhat unlikely
    c. Neither unlikely nor unlikely
    d. Somewhat likely
    e. Extremely likely

Interview Questions

For Wineries with Cans:

1. What is your position within the company?
2. How many cases does your winery produce?
3. Who is your target audience?
4. Were you working at the company for the implementation of the canning process?
5. What were the initial barriers and fears about canning wine?
6. Why did you add canning? Was there a target market in mind?
7. What was the initial response to your products being canned and has that changed or developed in any way?
8. What has been the impact on revenue since you started canning?
    a. Any financial gain or loss?
9. What is your primary method for packaging?
10. What is your packaging cost estimate?
    a. What percentage of production cost is the packaging?
11. Have you seen an increase in your consumer demographic since you have implemented cans?
12. Does your best-by date change when putting the wine in a can versus a bottle (only for wineries with both cans and bottles)
13. What would you say to wineries on the fence about starting to can their wines?
14. Is there anything else you feel like we should know or wish we would have asked?

For Wineries without Cans:

1. What is your position within the company and how long have you been there?
2. How many cases does your winery produce?
3. Which channel do you sell most of your wine through?
4. Who is your target audience? From a marketing perspective, How do you reach them?
    a. Are you currently trying to reach new target audiences?
5. What do you know about canned wine?
6. Has your company considered canned wine? Is it even feasible? Why or why not?
7. Do you think that canned wine would reach a different target audience?
8. Do you have any reservations about canning wines?
    a. Is it too costly or not meant for your target audience?
9. Do you believe canning your wine will affect your brand image?
10. Do you believe canned wine is a trend or is it here to stay?
11. On your website it says that your wines are all about the flavor, with none of the pretension so would you think canned wine fits in with those values? (Field Recordings)
12. Do you think the size of your winery affects the decision not to implement canned wine?
13. Do you know of any local wineries we should contact who have either considered canning wines or implemented them already?
14. Do you have anything else you would like to add that we did not address?