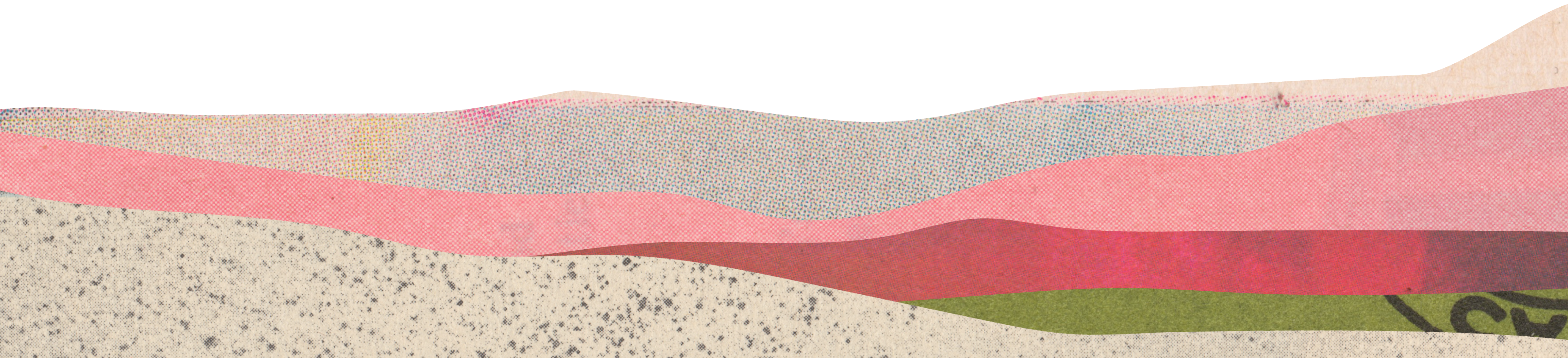


FeelGoods

CREATING **BEVERAGE BRANDS** WITH FEELING

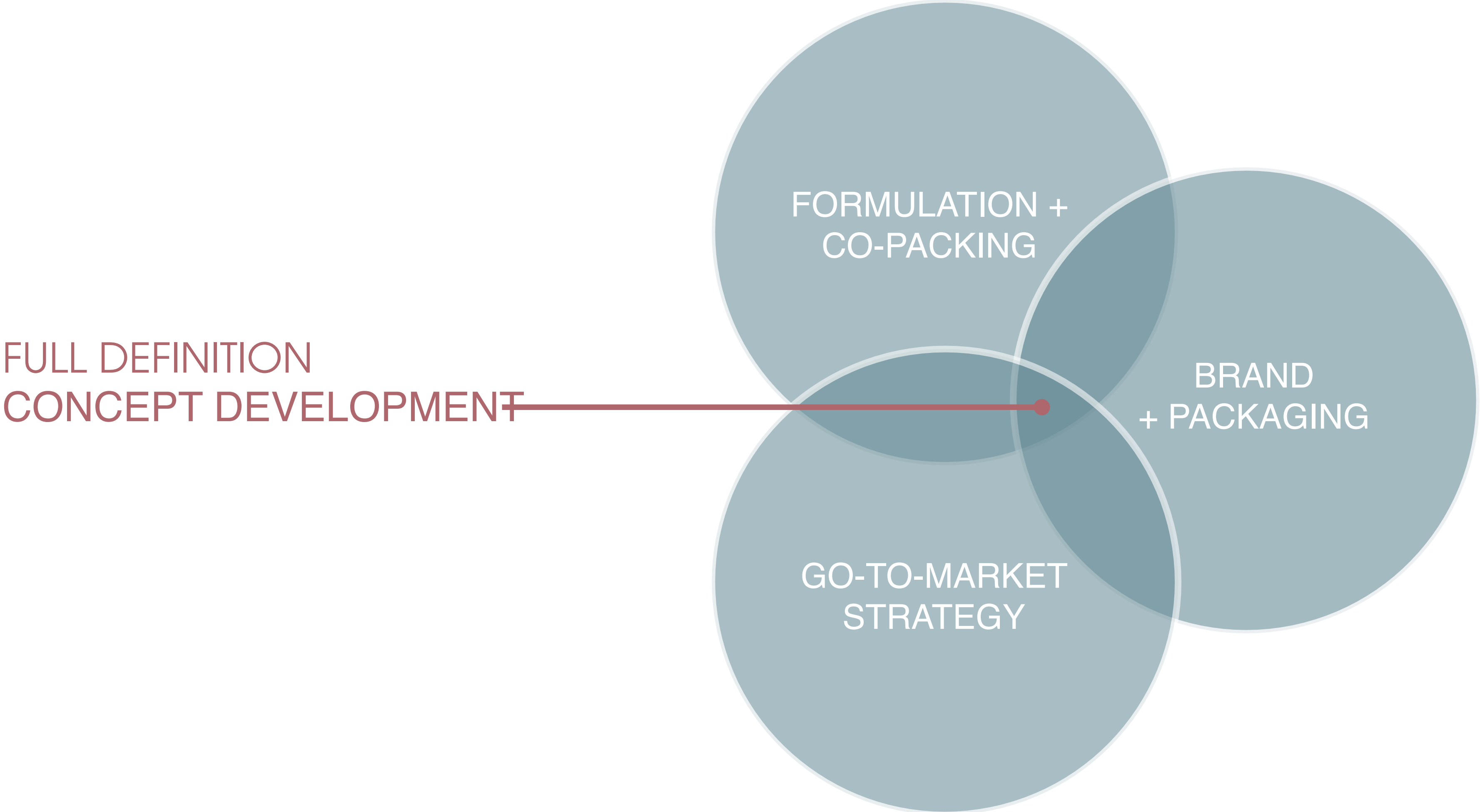


FeelGoods

The cider-only consumer no longer exists

Why decisions should start with
cross-category drinkers

What we do



FULL DEFINITION
CONCEPT DEVELOPMENT

Who we are



Bryan Roth
INSIGHTS + ANALYSIS

WHAT I DO

I help people understand new ideas through analysis and discovery

- Provide research and guidance for product development and market strategy.
- Use reporting skills and data analysis to simplify complicated stories that explain ways to connect with consumers.

HOW TO REACH ME

@BRYANDROTH

BRYAN.ROTH@FEELGOODSCOMPANY.COM

Who we are

FEEL GOODS TEAM

Michael Kiser, Founder

CREATIVE DIRECTION + BRAND STRATEGY

Ryan Burk

FORMULATION + SENSORY STRATEGY

Chase Brooks

GO-TO-MARKET STRATEGY

Araña Shulke

BRAND + PACKAGING DEVELOPMENT

SELECT CLIENTS

**NEW
BELGIUM.
BREWING**

ESTD 1846
Dewar's

*East
Brother*
BEER CO.

CINDERLANDS
PITT BEER CO PENN

**ANGRY
ORCHARD**
HARD CIDER



METRIC COFFEE



**MIDWEST
COAST**



**CRUZ
BLANCA**
BREWERY CHICAGO

SINCE 1868
Martinelli's
GOLD MEDAL®

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What we'll cover

- Who is the drinker and why does that matter?
- What's happening with drink options and why is that important?
- How to reach the consumer when everything is everywhere all at once



PANIC



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ADAPTATION



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NEW
NORMAL



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WON'T
GO
BACK



FeelGoods

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**Who is the drinker and
why does that matter?**

Overlap of beverage alcohol buyers and categories

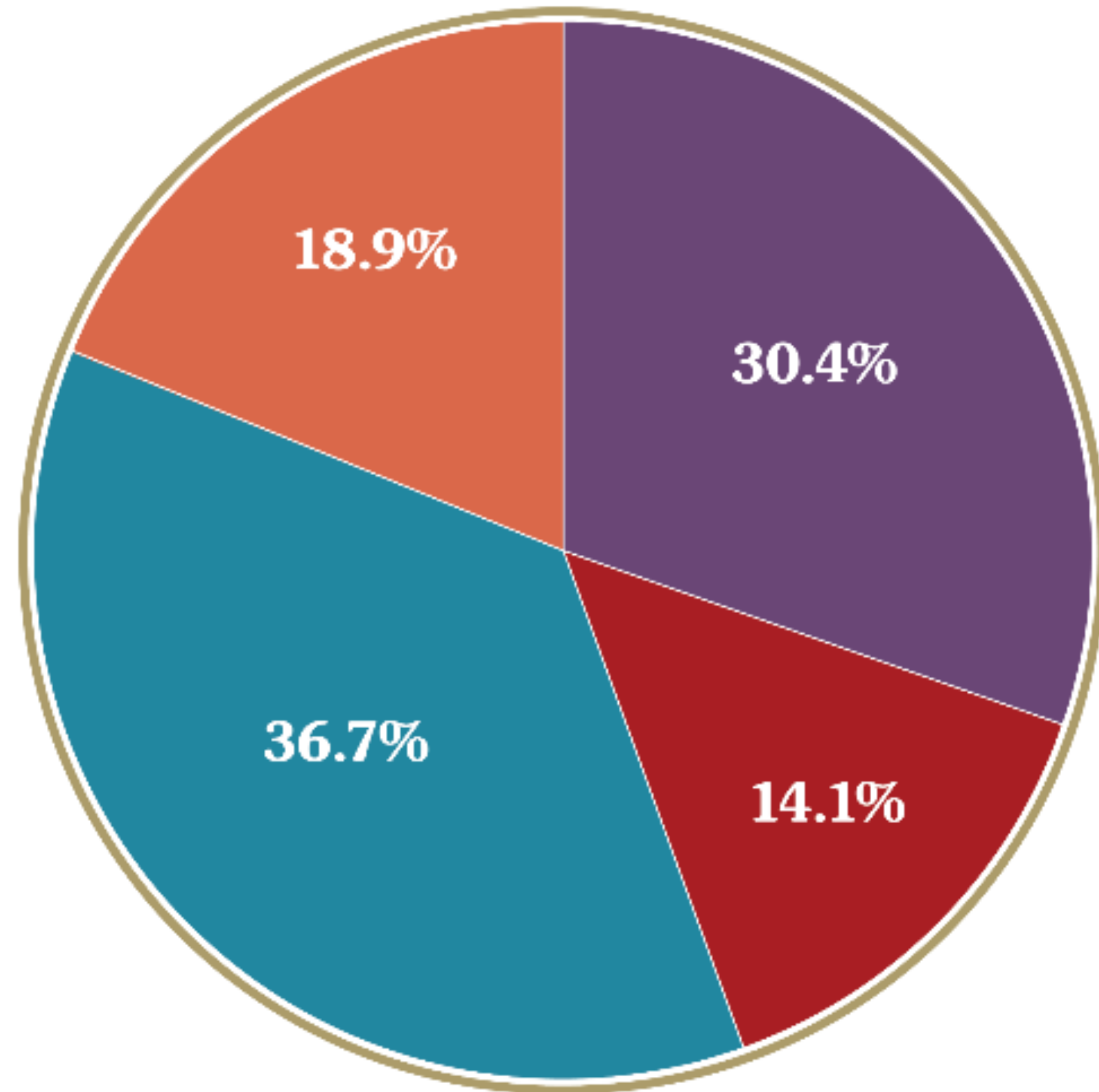
Percentage of people buying in each segment

● Wine ● Beer ● Spirits



Source: NielsenIQ

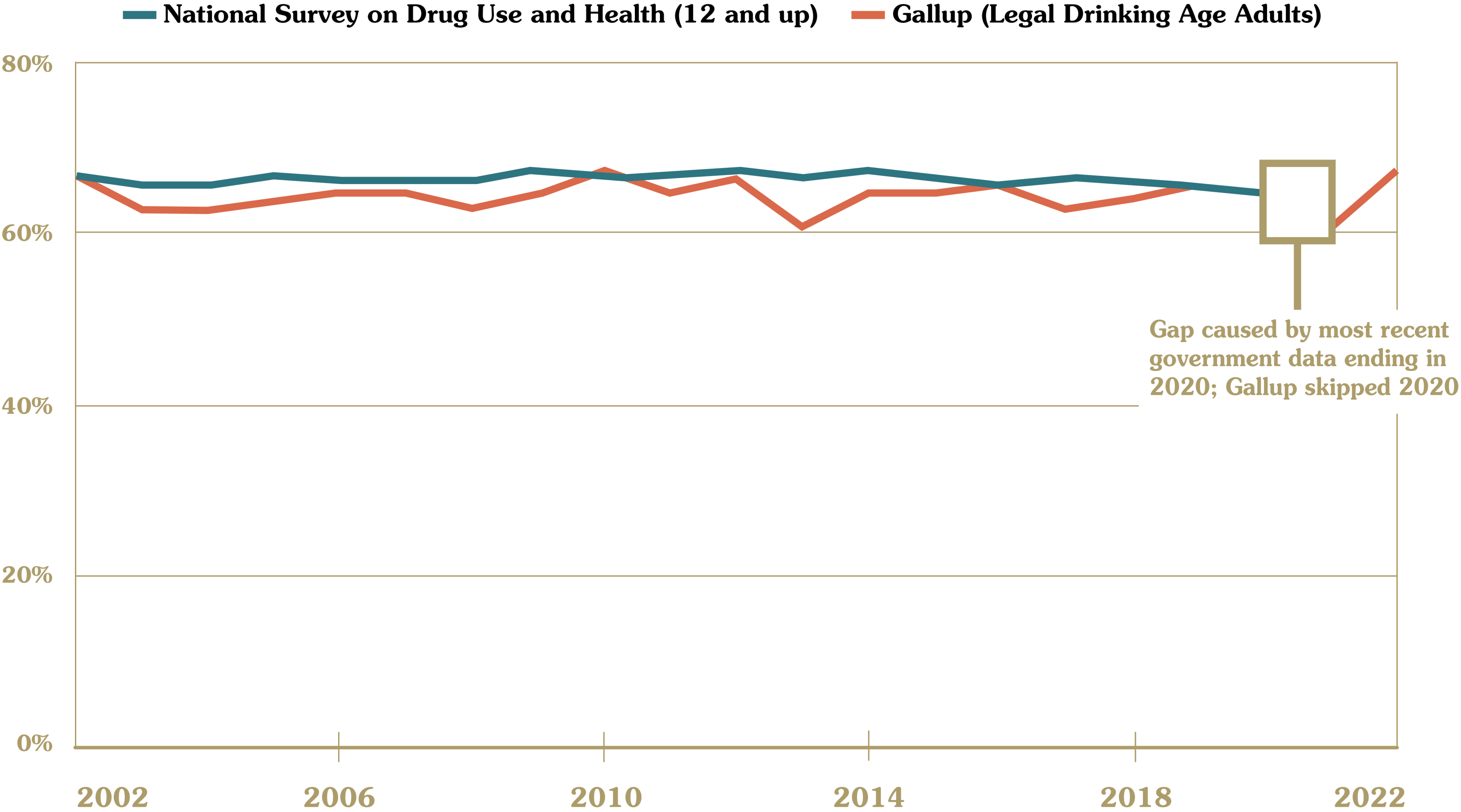
Share of servings by 2024



140.7 Billion Servings
12 oz. beer, 5 oz. wine,
1.5 oz. spirits; all shares
based on volume depletions

● Spirits ● FMB ● Beer ● Wine

Percentage of Americans who say they consume alcohol



Gap caused by most recent government data ending in 2020; Gallup skipped 2020

Source: Natl Survey on Drug Use and Health/Gallup



Changes in college students' alcohol use before/after pandemic

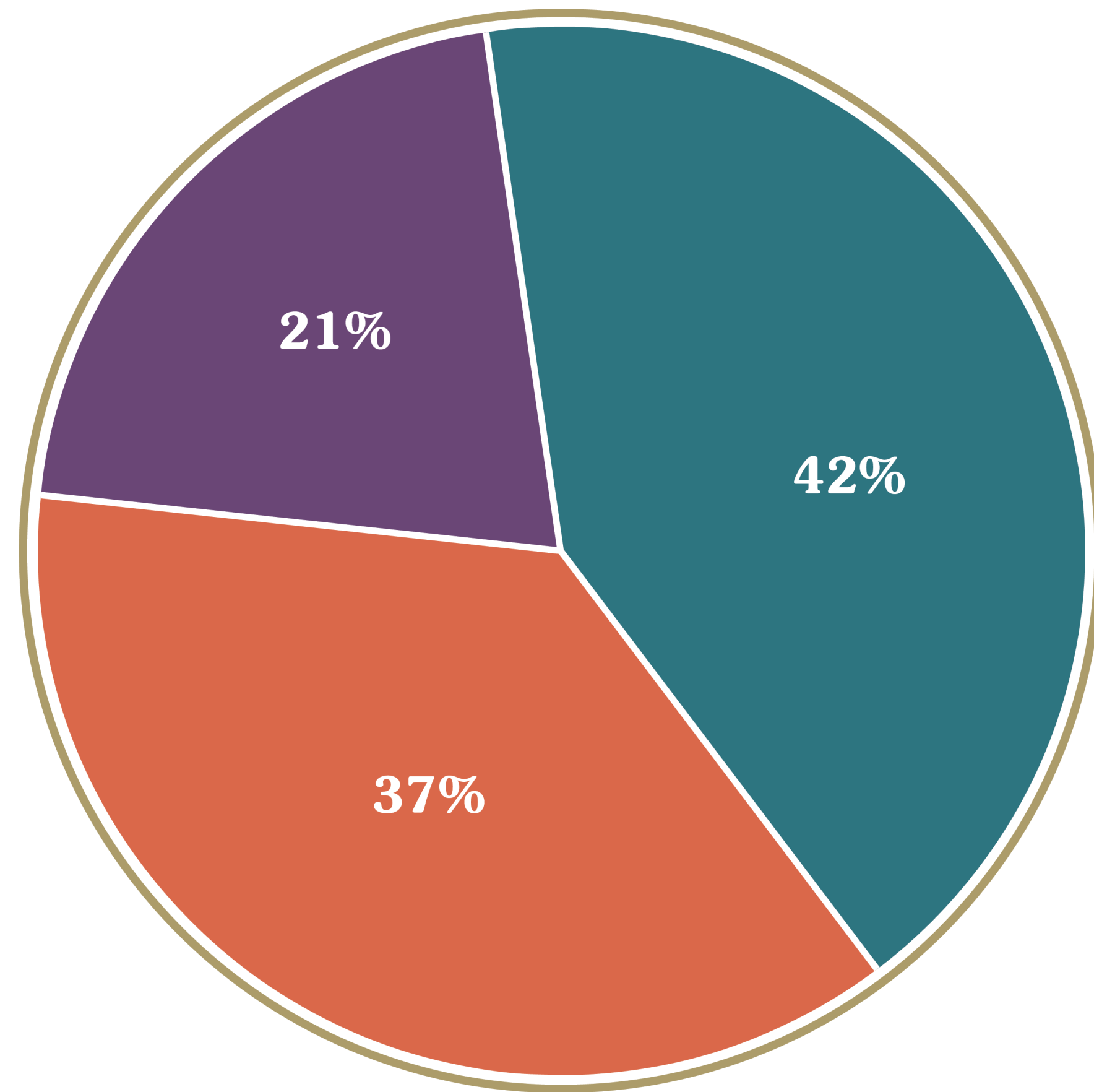
	Pre-Closure	Post-Closure	Change
Days drink during week	2.8	3.1	0.3
Drinks per typical week	11	9.4	-1.6

Changes in college students' alcohol use before/after pandemic

Non-Heavy Episodic Drinkers

	Pre-Closure	Post-Closure	Change
Days drink during week	2	2.5	0.5
Drinks per typical week	4	5.4	1.4

Change in alcohol consumption vs. pre-pandemic



● Drink Less ● Drink More ● Drink About the Same

What kinds of alcohol do you drink? (ages 21-28)

Liquor (including cocktails)	71%
Beer	67%
Wine	55%
Flavored malt beverages	54%
Hard cider	32%

“My entire friend group and people I know casually from school, we’re going out every weekend.”

MAGGIE JENSEN
UNIVERSITY OF MONTANA SENIOR

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**What's happening with
drink options and why is
that important?**



Whose Time Is It, Anyway?

Where Everything in Alcohol is Made Up and Only the Dollars Matter



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Drinkers aren't worried about the category



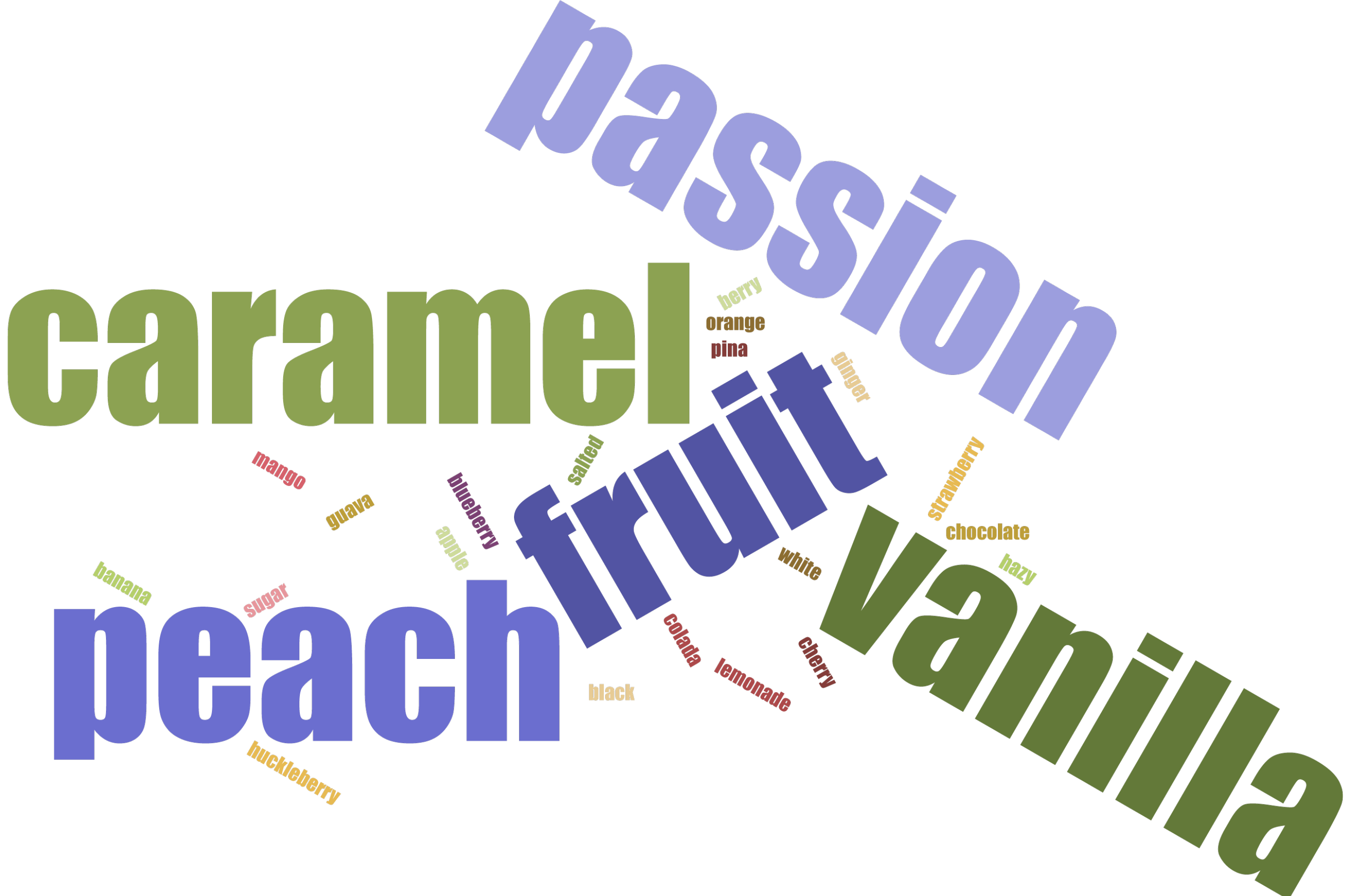
Drinkers are focused on flavor



Lead descriptor on top-selling new ciders, beers, and spirits



Lead descriptor on top-selling new ciders and spirits



Lead descriptor on top-selling new ciders

pina colada
peach berry
mango
tropical
passion fruit
hazy
vanilla
guava
light
blueberry
orange
ginger
sugar
caramel
huckleberry

“All the recent cider innovation points to a category that is benefitting from consumer interest in RTDs.”

IWSR

FeelGoods



Strawberries

**Strawberry
flavored
things**



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Share of Craft Lager/Pilsner by sub-category

	2017	2022	Change
“Plain”	90.2%	89.4%	-0.75%
Flavored	5.6%	8.4%	2.8%
Hop-Forward	4.3%	2.2%	-2.1%

Source: IRI

Flavored spirits share is also significant



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Weekly craft beer drinkers who drink other beverage alcohol at least once a week

	2019	2022	Change
Hard Seltzers	30%	55%	25%
FMBs	35%	56%	21%
Hard cider	27%	46%	19%
Spirits	52%	63%	11%
Imported beer	59%	68%	9%

Source: Brewers Association

People aren't buying because of a category...





Strawberries

**Strawberry
flavored
things**

...they're buying
on vibes

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Selling vibes: Artifact Cider



VIBE
dare or
truth



VIBE
brunch +
beach



VIBE
fight not
flight



VIBE
sunset
sips

Flavor leads consumers across categories and opens up new occasions



RTD Cocktails — The Fastest-Growing Alcohol Category is Fueled by Flavor



For Example — How a Low-ABV Wine is Expanding Categories and Occasions



Sweet and ? — Sour Beer Sales Show You'll Want to Leave This Taste in Drinkers' Mouths



Pour Me Another — A New Focus on Flavor Helps Spirits Thrive Even More

Lead descriptor on 2022 top-selling new cider

BERRY

6

IMPERIAL

5

VARIETY PACK

4

TROPICAL

3

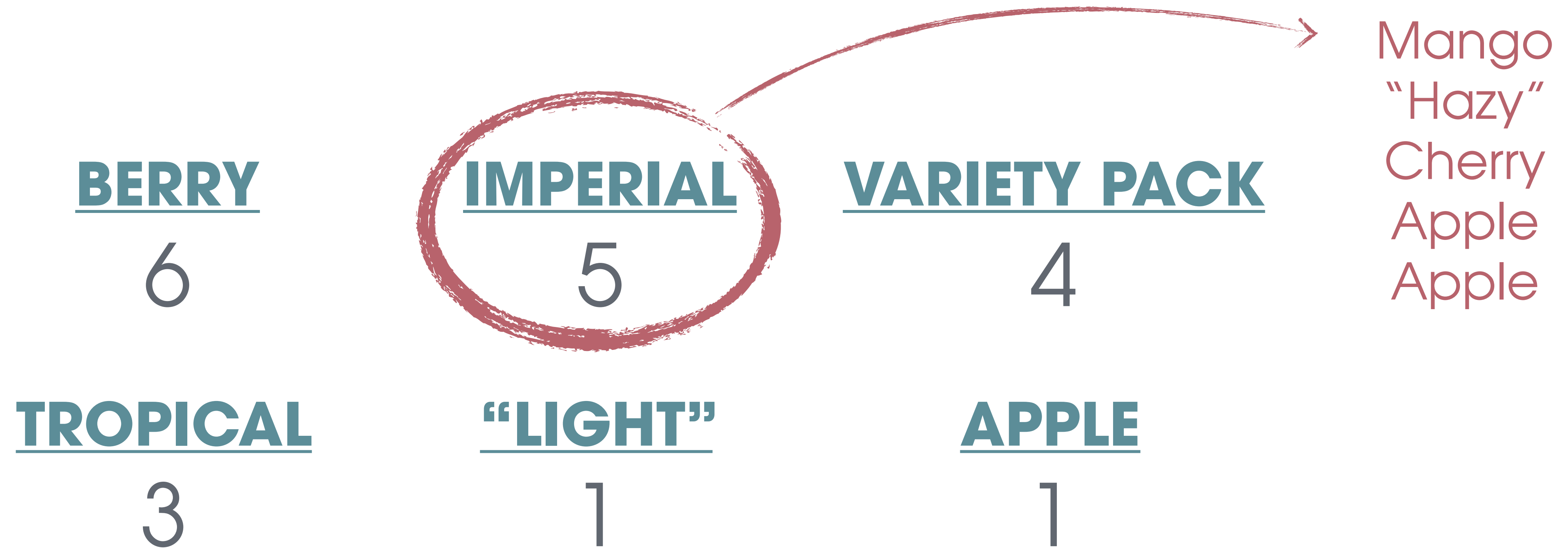
“LIGHT”

1

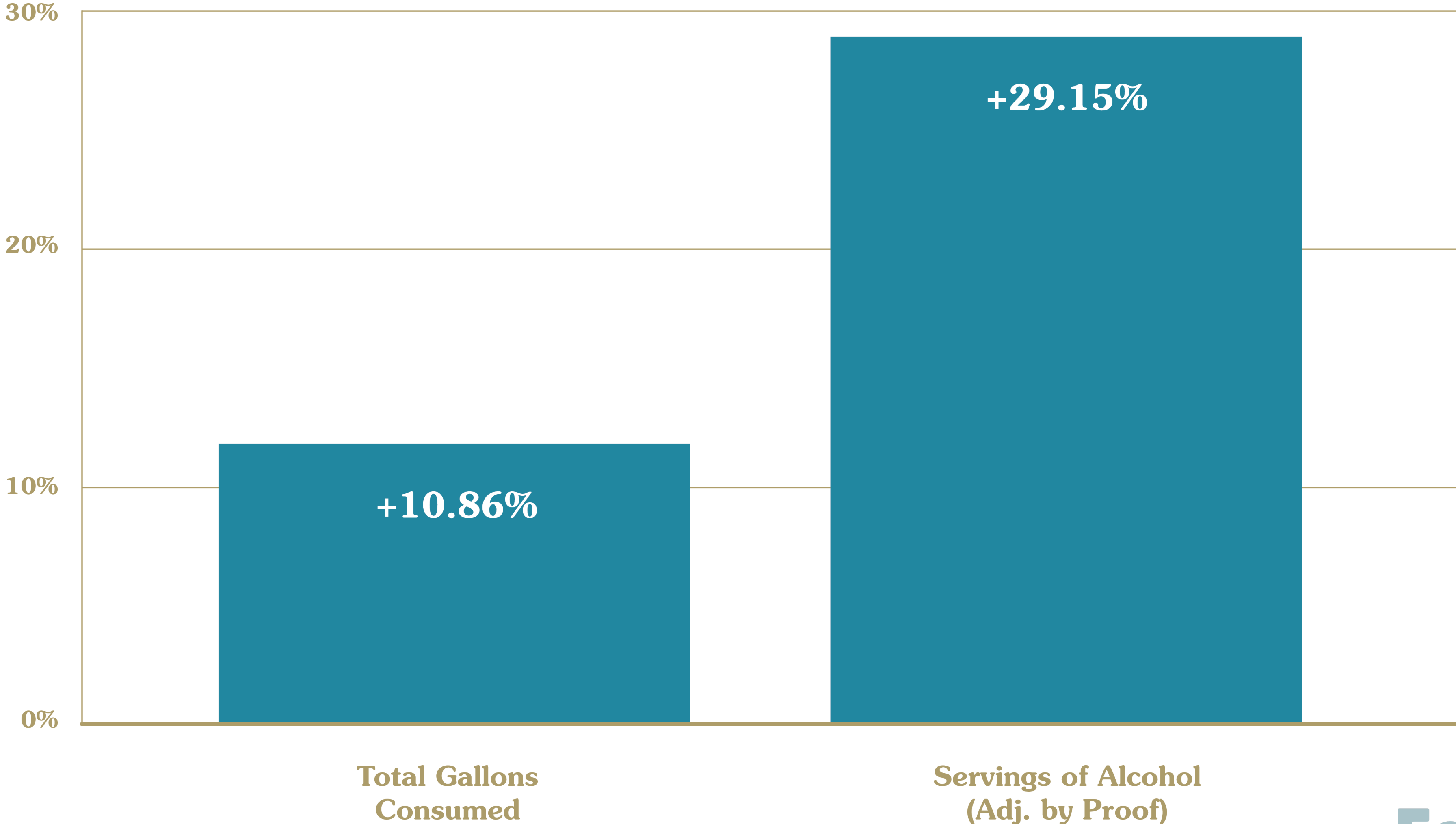
APPLE

1

Lead descriptor on 2022 top-selling new cider



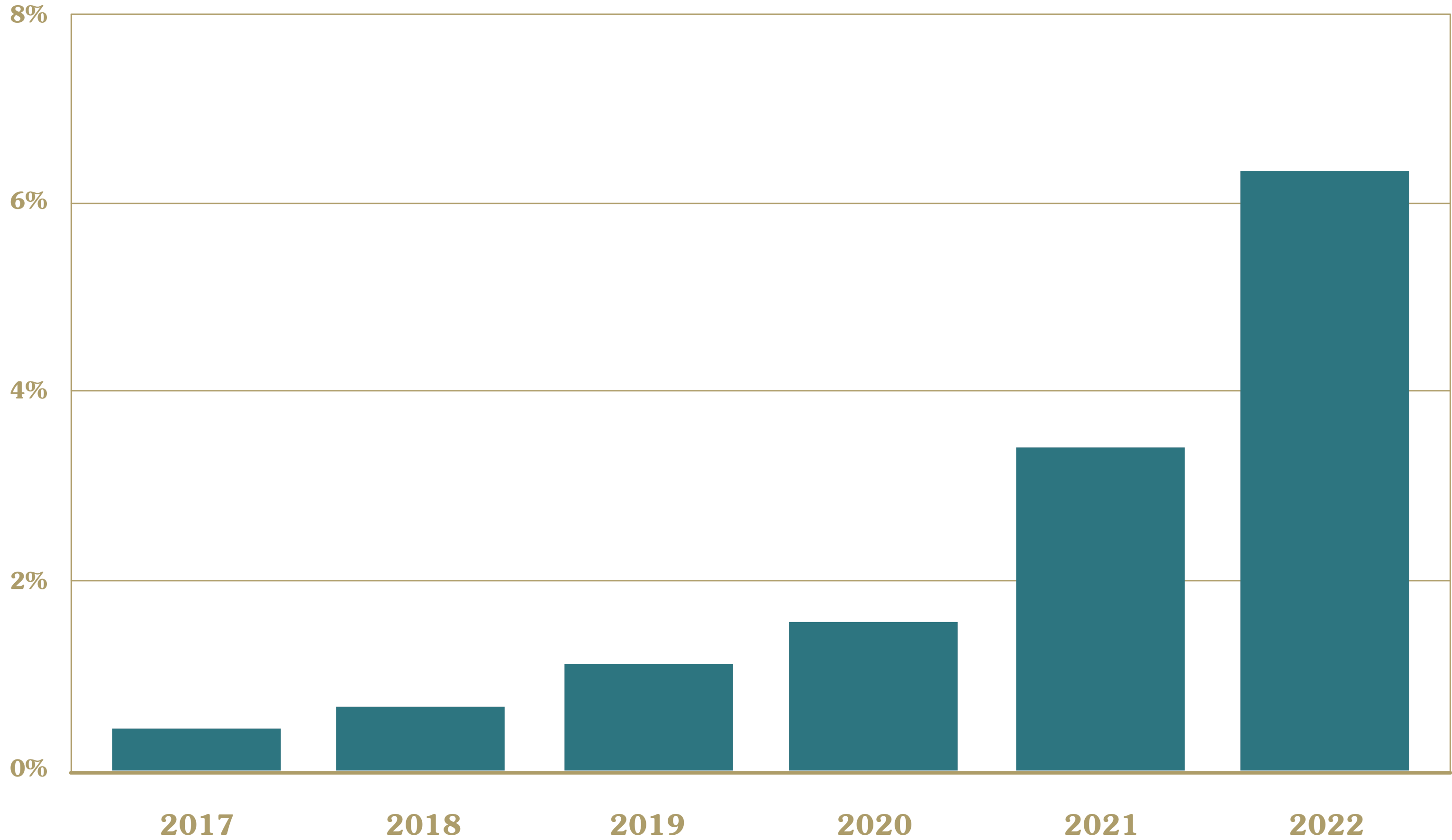
Growth of alcohol consumption, 2000-2020



Source: Govt/Private Org Mix



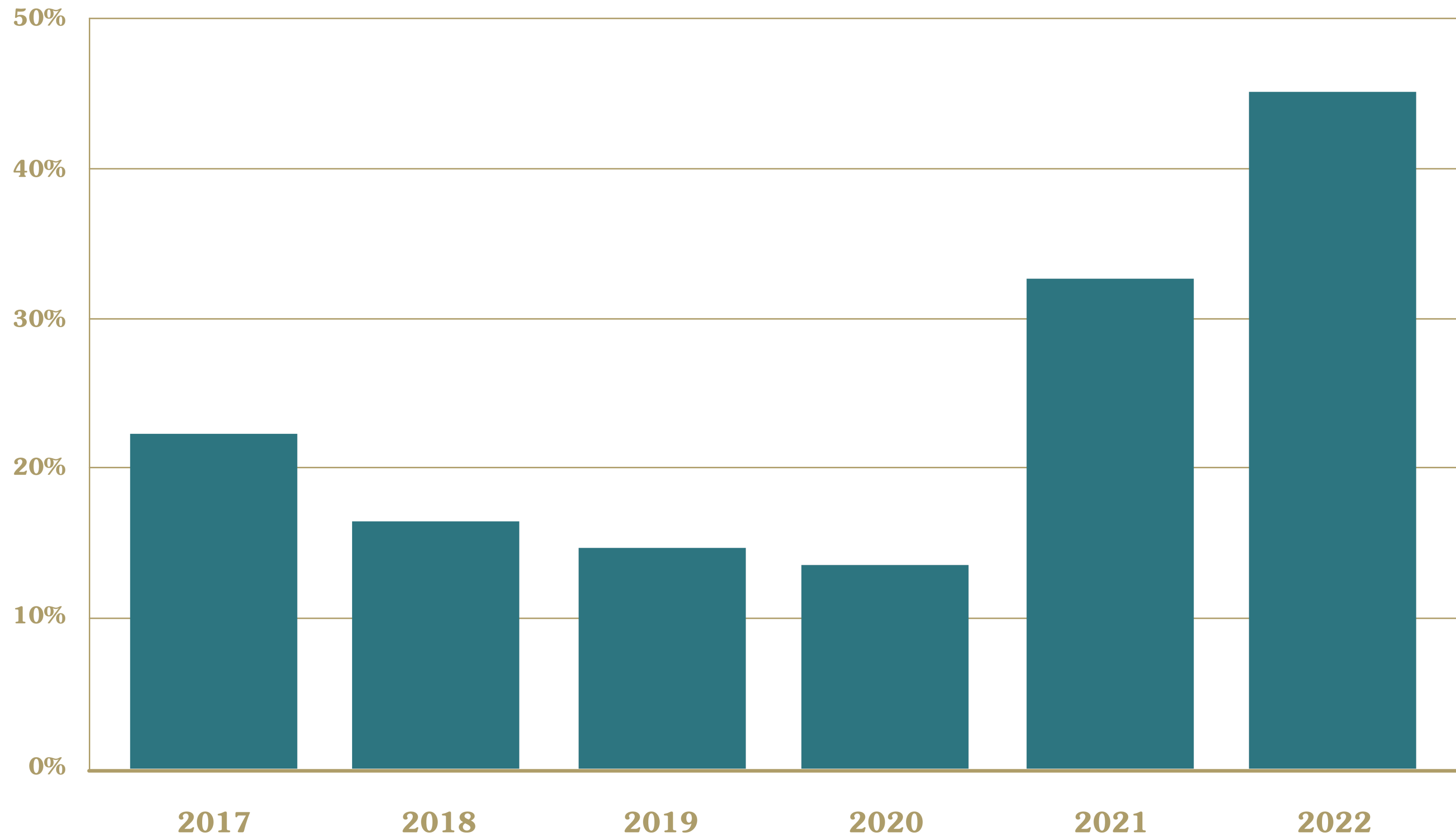
Imperial Cider share of category sales in chain retail



Source: IRI



Share of Imperial Ciders in 2 Towns' portfolio



Source: IRI

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**How to reach the consumer
when everything is
everywhere all at once**

Don't simply be a cider producer—be the provider of an experience

REALITY

People are more category-agnostic than ever



OPPORTUNITY

There's a blank canvas with which to explain your value to people

“What does it taste like?”

What's the consumer experience?

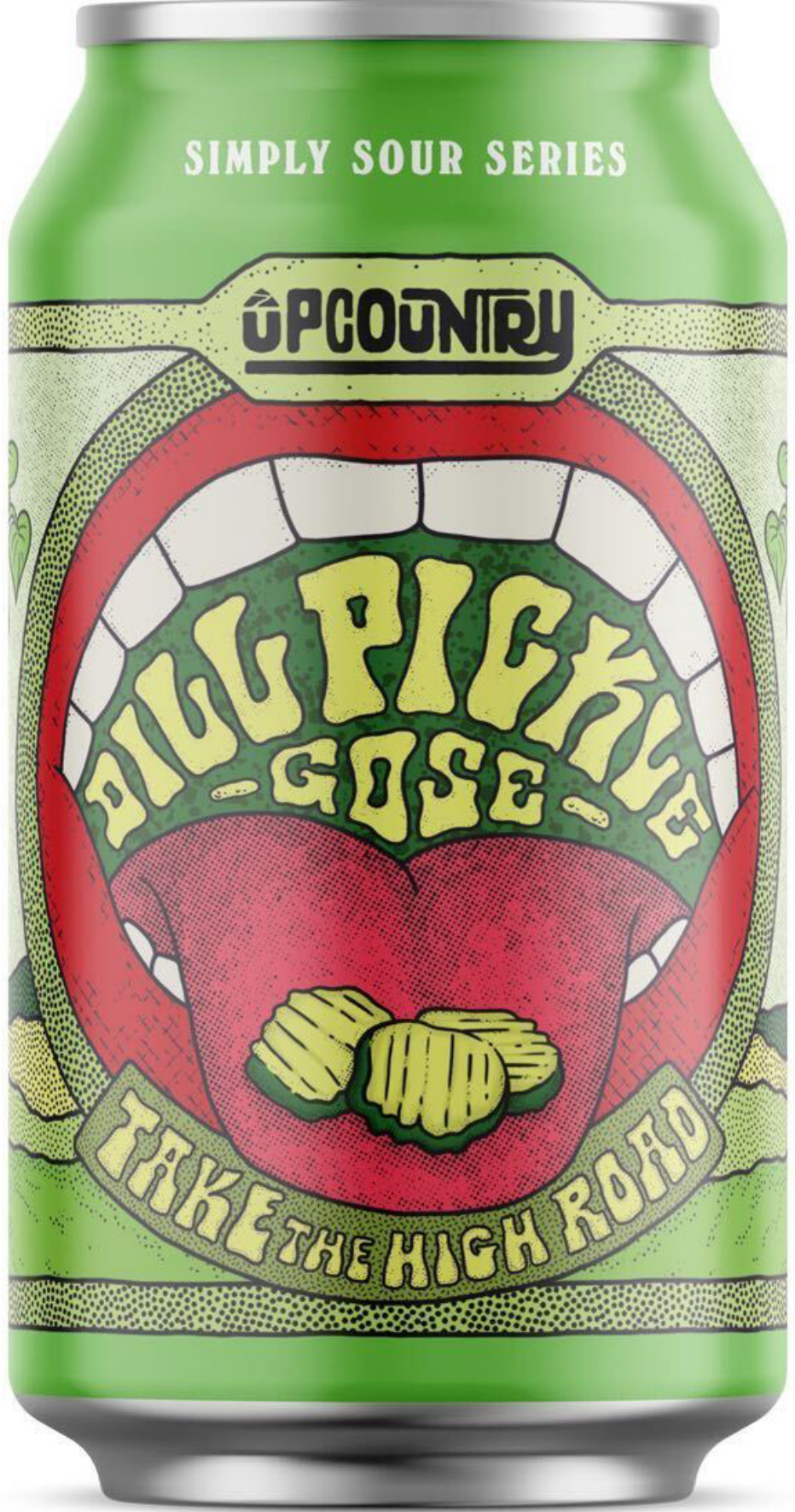
What do you pay attention to most when buying alcohol?

1	Price
2	Unique flavors
3	Alcohol content

What attributes are most important when buying alcohol?

1	Flavor
2	Freshness
3	High ABV

We launch brands that manage quality of product and flavor-focused marketing





SUGAR
& SPICE

BLUE
BARN
CIDERY



HARD CIDER
5.5% ALC/VOL

FeelGoods



FIERCELY LOCAL

BELLINGHAM
CIDER CO.

POG

GLUTEN-FREE

HANDCRAFTED IN BELLINGHAM, WA
12 FL OZ (355 ML) / 6.7% ALC BY VOL

FIERCELY LOCAL

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12 FL OZ (355 ML) / 6.7% ALC BY VOL



“Can I get somebody to judge a book by its cover and then pick it up and try it? ... Get them with their eyes first and then hopefully please them when they have whatever they drink.”

SOHAM BHATT
ARTIFACT CIDER PROJECT CO-FOUNDER

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Let's recap

Why your decisions should start with cross-category drinkers

- Who is the drinker and why does that matter?
- What's happening with drink options and why is that important?
- How to reach the consumer when everything is everywhere all at once

Who is the drinker and why does it matter?



What's happening with drink options and why is that important?

"There's far less drinking of alcohol at places where seltzers are available."

"It is a fact that there is less drinking in this country than ever before."

"Women smoke more, but men now drink less."

"Young people are drinking less than they did before in the history of the world."

Changes in drinking have been tracked for as long as newspapers would write about them

SCEN. SARATOGA'S MORAL ATMOSPHERE.
I have been pleased to see the order which prevails in Saratoga. There is little or no intoxication to be seen upon the streets. Whisky is dear, I am told. I have observed that there is generally much less drinking of alcoholic stimulants at places where mineral waters are freely used than at seaside resorts. There is also visible a very general and profound respect for the Sabbath in Saratoga. The churches are well attended and the preaching is done mostly by men of high intellectual order. Some of the ablest ministers of the gospel come here in the summer. I have had the pleasure of listening to Dr. T. L. Cuyler, of Brooklyn; Dr. J. P. Newman, of New York, and the Rev. Dr. Yerkes, of Plainfield, New Jersey. The daily prayer meetings are well sustained, and the audiences are in profound sympathy with the success of the gospel and thoroughly responsive to the prayer that it may be in every man and woman a well of water springing up into everlasting life.

Liquor Drinking.
While it is not to be denied that there are still those throughout this section who would restore the public sale of intoxicating liquors if they could, nevertheless it is a fact that there is less general drinking of intoxicating liquors in this county than there has ever been.
People who are old enough to be familiar with the record, are aware that the crusade against the public sale of liquor was commenced in this county before the Civil war, and although there was a long period of inaction during and following the war, the fight was resumed in the early seventies and continued until the saloons were driven out about 1881, and kept out until a dispensary was established nearly twenty years later.

Young Men Drink Less
"I understand that girls smoke more nowadays, but on the other hand men drink less. Despite all that the anti-prohibitionists say, I am sure of myself when I say that young men drink less. There is practically none of the old rowdiness which used to be "the thing" among college men."

Youth Seeks Less
Mrs. James L. Laidlaw of the New York committee for law enforcement expressed the opinion that young people are drinking less than they did before in the history of the world.
It was the prohibitionists' third day before the committee, four more are to follow, giving the drys a period equal to that taken by the wets in their severe denunciation of the anti-
(Continued on page nine.)

"There's far less drinking of alcohol at places where seltzers are available."

WASHINGTON EVENING
STAR
AUGUST 25, 1883

"It is a fact that there is less drinking in this country than ever before."

YORKVILLE ENQUIRER
JUNE 6, 1913

"Women smoke more, but men now drink less."

THE BERKSHIRE EAGLE
MAY 8, 1926

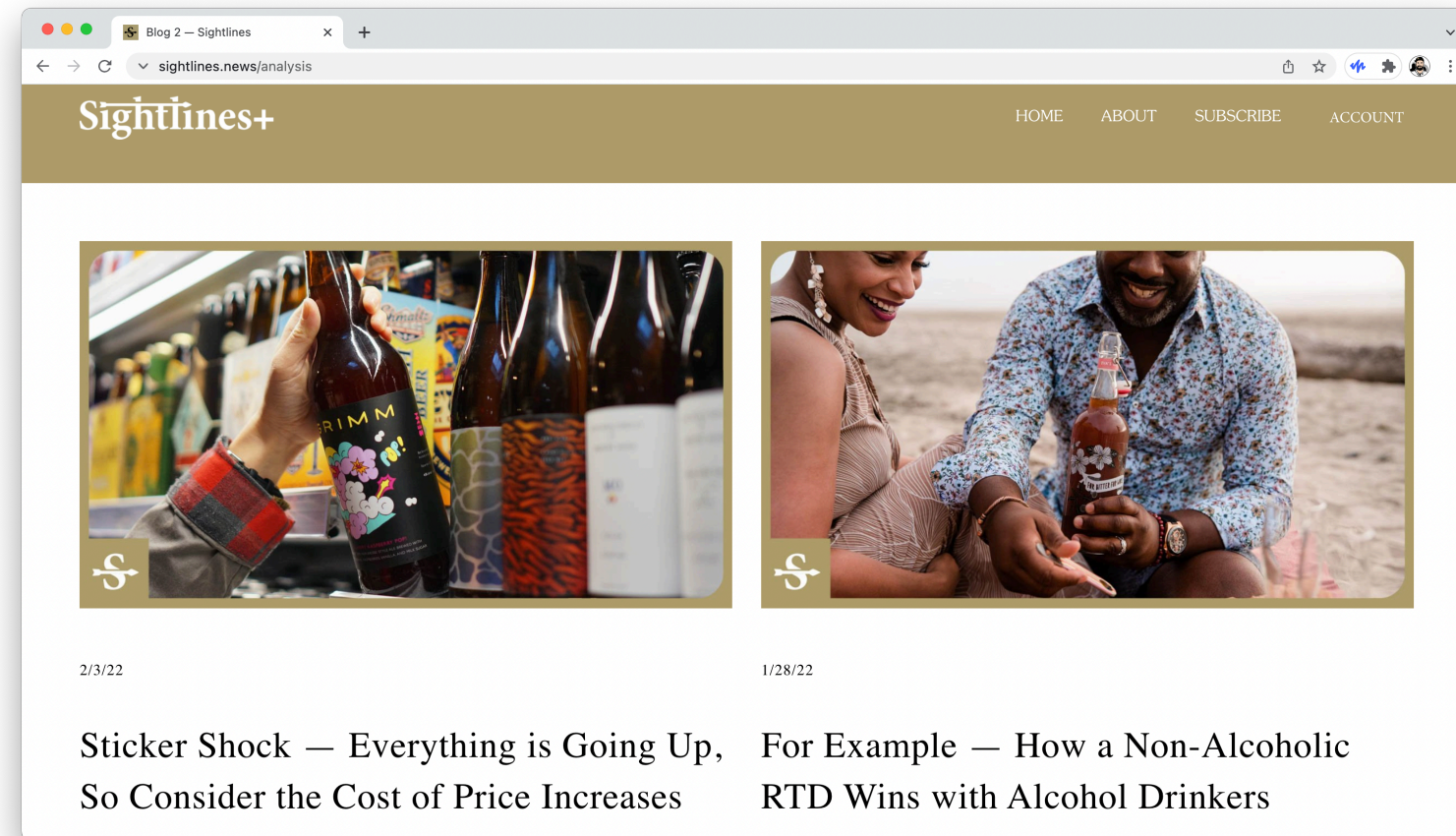
"Young people are drinking less than they did before in the history of the world."

THE BISMARCK TRIBUNE
MARCH 12, 1930

How to reach the consumer when everything is everywhere all at once



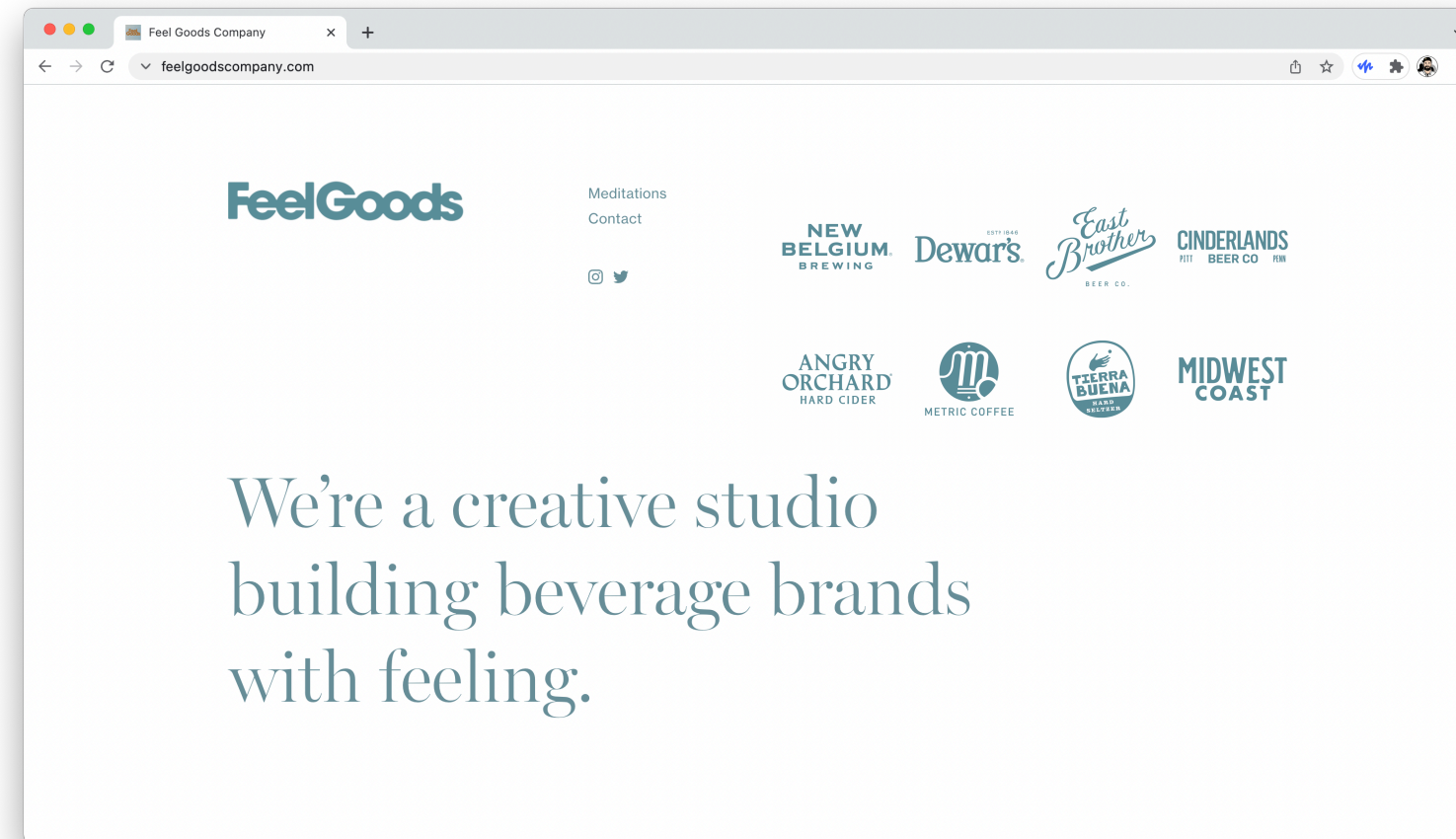
What to do next



SIGN UP FOR SIGHTLINES.NEWS

Insights-driven content and community for beverage alcohol decision-makers

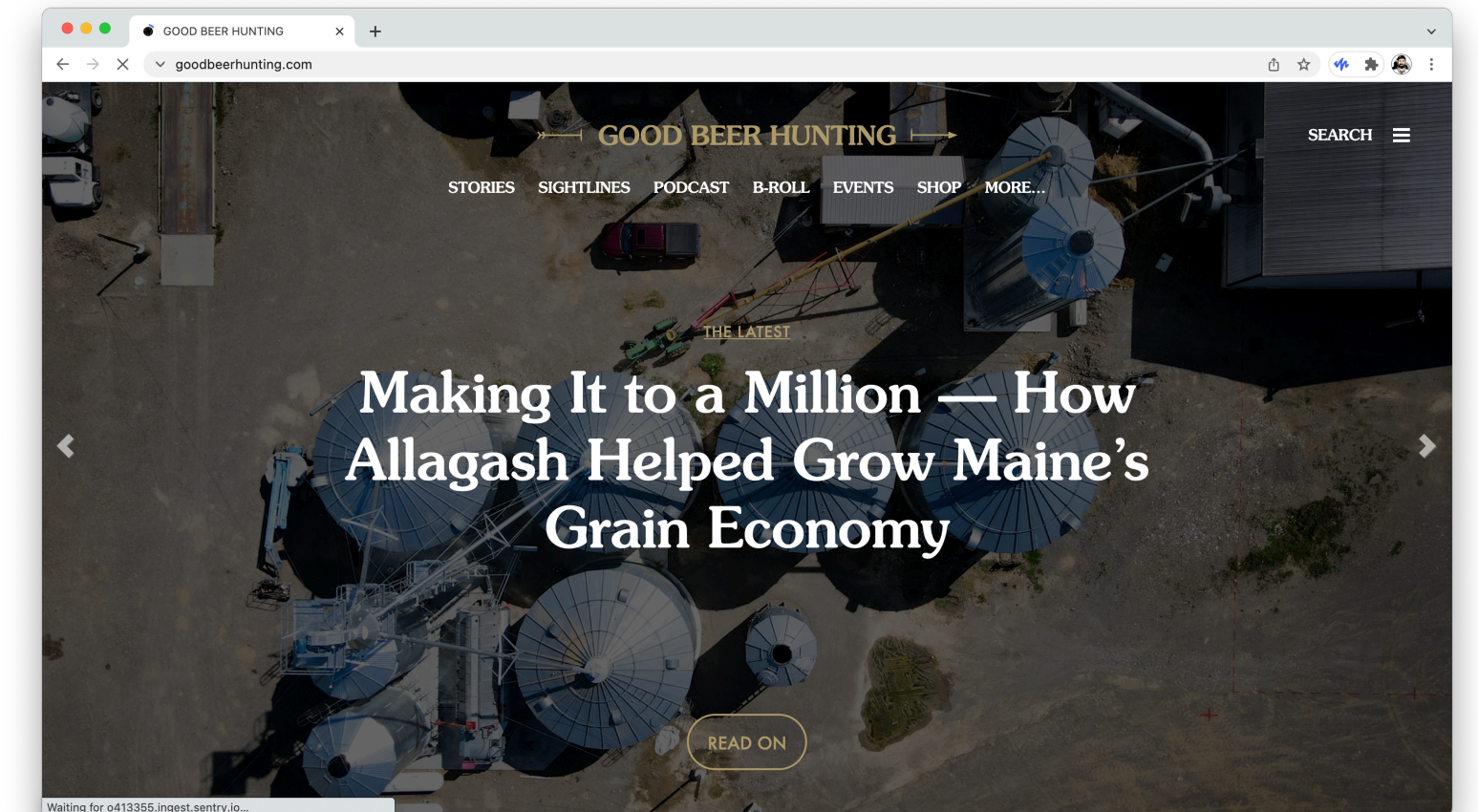
- Subscription newsletter
- Video interviews and strategy sessions
- Professional community
- Bryan Roth and Kate Bernot



EXPLORE THE FUTURE WITH FEELGOODS

Holistic product and brand development beverage alcohol

- Decades of combined CPG and Bev alc experience
- Innovation pipeline
- New brands
- Experts in formulation, market strategy, innovation



CATCH UP ON CULTURE WITH GOOD BEER HUNTING

Internationally leading beer and beverage culture magazine

- 40+ writers around the globe
- Dozens of awards
- Top 1% podcast
- Claire Bullen, Evan Rail, Bryan Roth



Reach out



Bryan Roth
INSIGHTS + ANALYSIS

HOW TO REACH ME

@BRYANDROTH

BRYAN.ROTH@FEELGOODSCOMPANY.COM

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Thank you!

