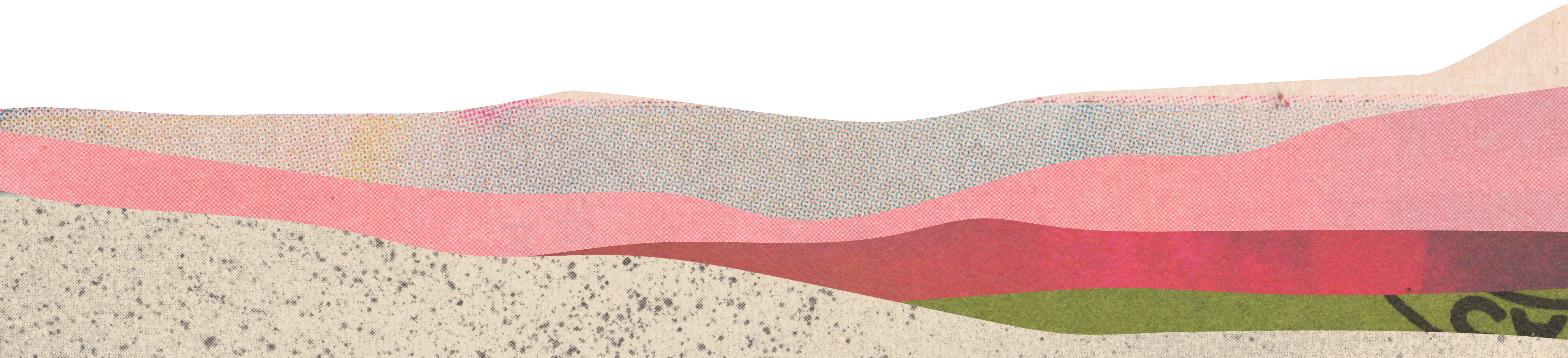


FeelGoods

New Skins

HOW BRAND POSITIONING AND PACKAGING DESIGN
CAN REINVIGORATE A CATEGORY AND CONNECT
WITH NEW DRINKERS

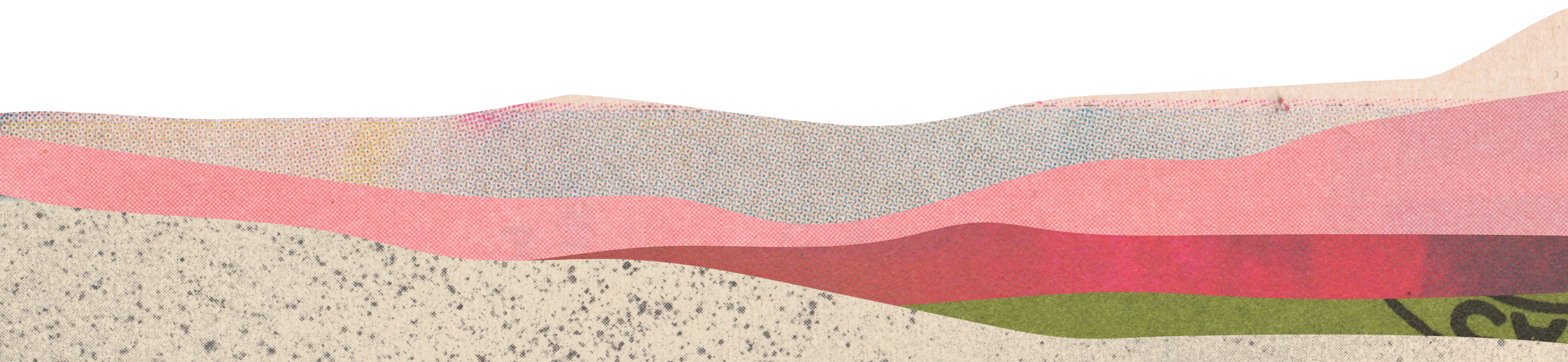


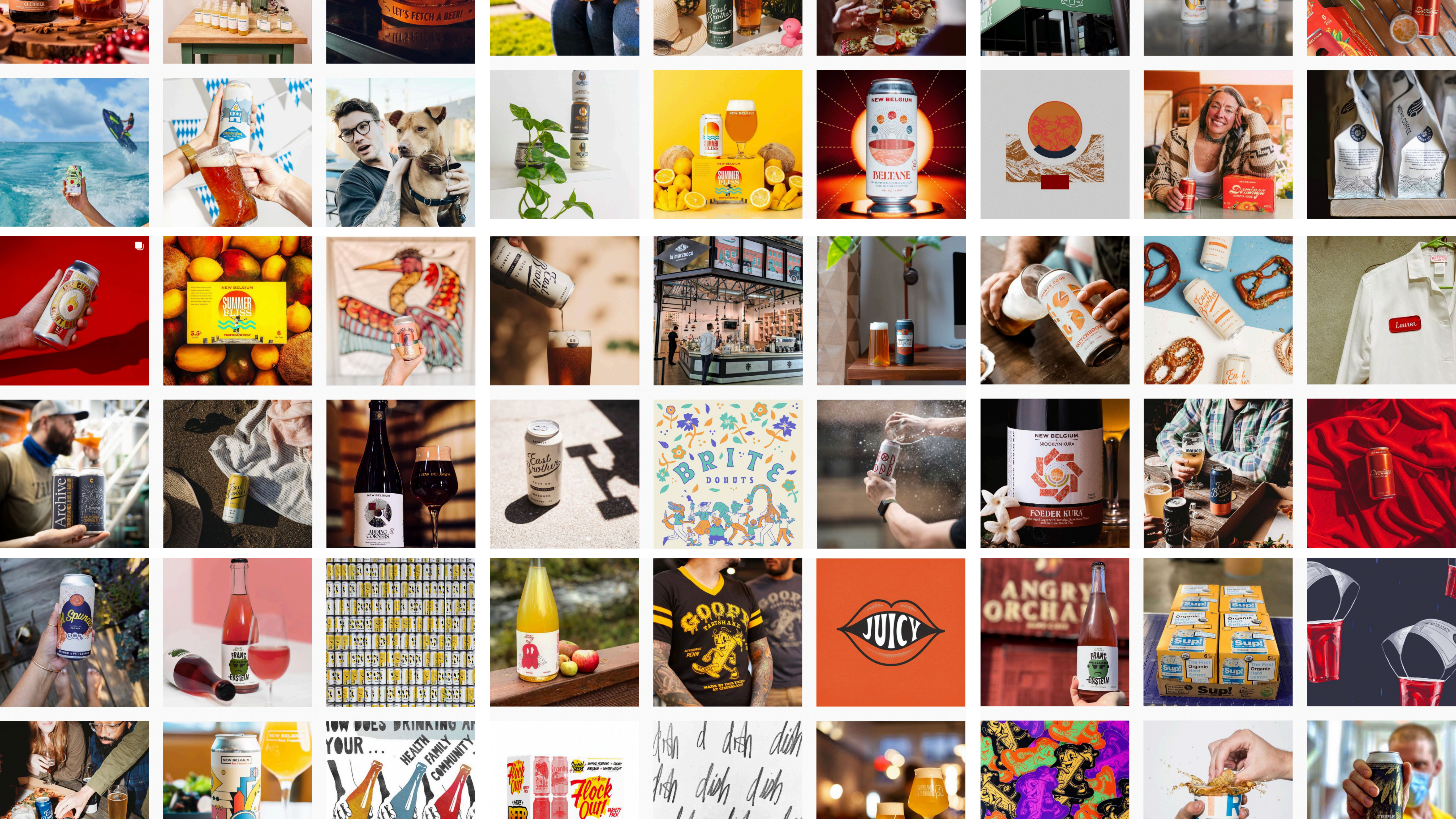
FeelGoods



- 15 years innovation strategy for tech + CPG, i.e. mobile, telepresence, athletic gear, snack foods and beverage
- Founder Good Beer Hunting in 2013, industry-leading, insights and editorial platform, top 1% podcast, 45 publishing awards, 12 countries
- Pipeline partner in beer, cider, seltzer, coffee, spirits, including: New Belgium, Boston Beer/Angry Orchard, Dewar's
- Imbibe Magazine "75 People to watch"

MICHAEL KISER
@MPKISER





FeelGoods

Brand

Formulation

Packaging

**Go-To
Market**

FeelGoods

Brand

Formulation

Packaging

**Go-To
Market**

Let's talk packaging formats



Primary

A vessel sold individually or as part of pack

Examples

- 12oz Can of beer
- 750ml Bottle of cider
- 500ml Bottle of bourbon
- 32oz box of wine
- 8oz slim can of hard selzter
- 12oz tetrapak wine



Secondary

The outside container that sits on a shelf, containing one or more primary vessels

Examples

- 6-pack carton of cans
- 6-pack of bottles
- 12-pack variety pack of 12z cans
- 8-pack variety pack of 8oz cans
- 4-pack pakteck of 16oz cans
- 750ml cardboard tube for a whiskey bottle



Gimmickry

Variations on the primary or secondary package that enable a unique occasion or consumption experience

Examples

- Pull-tab cans
- Resealable 16oz aluminum pint
- Green bottled beer
- Twist-off wine bottle

Bang for your buck



← Vs. →



Gimmickry

Often adds expense that can't be passed on to consumer

Characteristics

- Doesn't disrupt channel logistics, consumer experience
- Marketing expense
- Temporary

Differentiation

Can help premiumize a brand in the eyes of the consumer, and pay for itself.

Characteristics

- Aligned with brand position
- Long-term investment
- Part of product experience in a meaningful way

Categories often have a default format



Building a framework

Categories often have a default format

What does beer look like?



Building a framework

Do categories have a format?

What does beer look like?



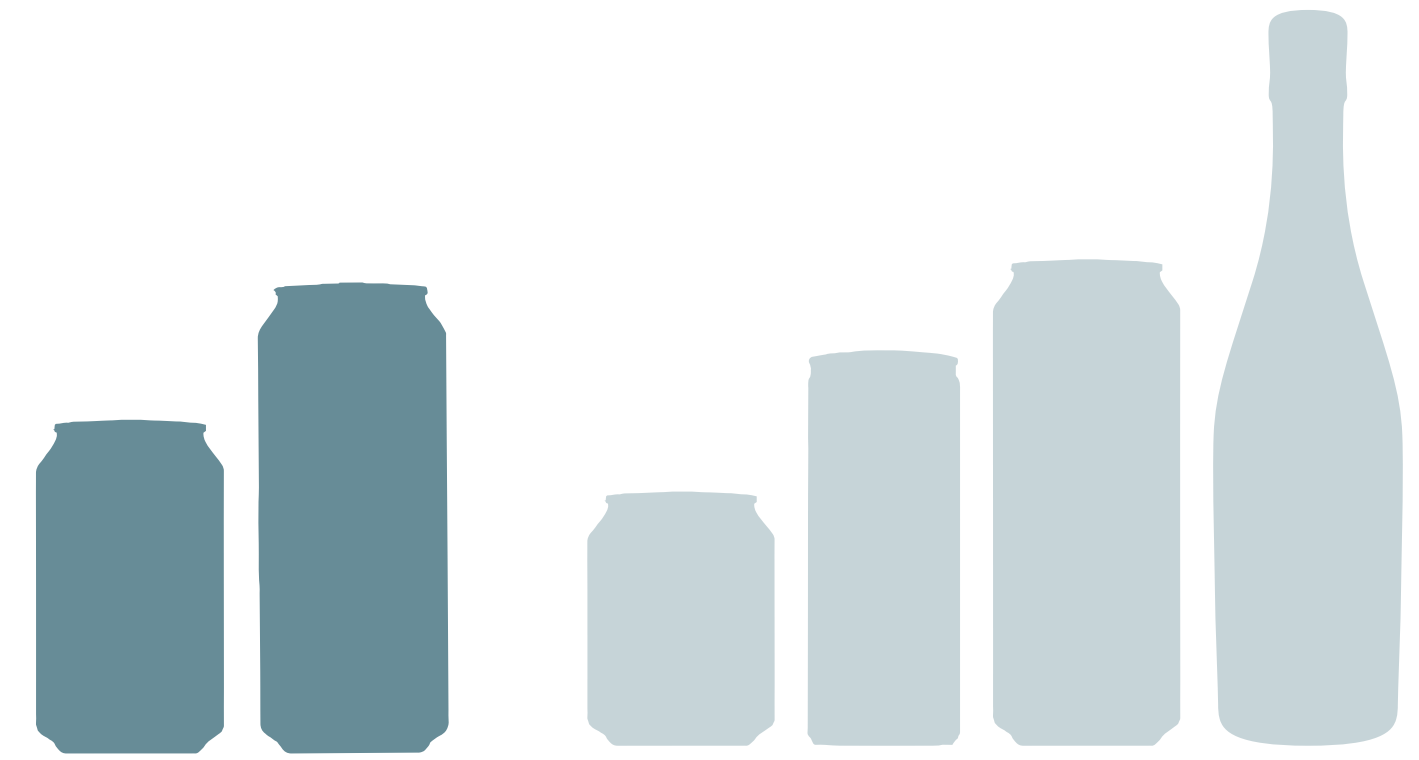
Do categories have a format?

Beer has largely converged as it differentiated



The last generation of beer

- 22oz bombers for craft
- 12oz cans for macro



Now it's an 80/20 rule

with 12 and 16oz cans for everything, and then a bunch of occasion-based variations:

- 8oz stubby cans
- Slim cans
- 22oz cans
- 750ml wine bottles
- 500ml bottles
- 4, 6 packs

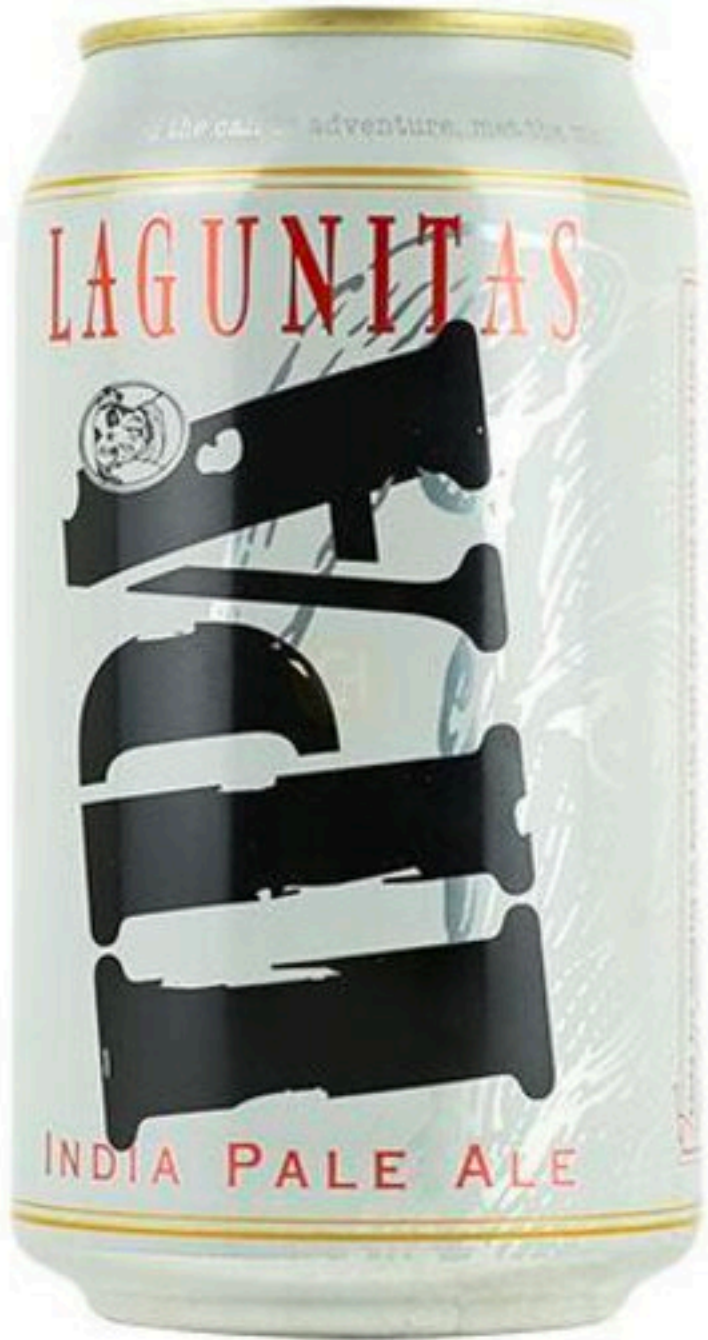
Building a framework

Supply chain + Culture Shifts



Building a framework

Supply chain + Culture Shifts



Building a framework

Supply chain + Culture Shifts



Building a framework

Supply chain + Culture Shifts



Building a framework

Supply chain + Culture Shifts



Building a framework

Supply chain + Culture Shifts



Building a framework

Supply chain + Culture Shifts



Building a framework

Supply chain + Culture Shifts



Building a framework

Categories often have a default format

What does wine look like?



Building a framework

Do categories have a format?

What does wine look like?



Building a framework

Categories often have a default format

What does Riesling look like?



Building a framework

Categories often have a default format

What does Natty Wine look like?



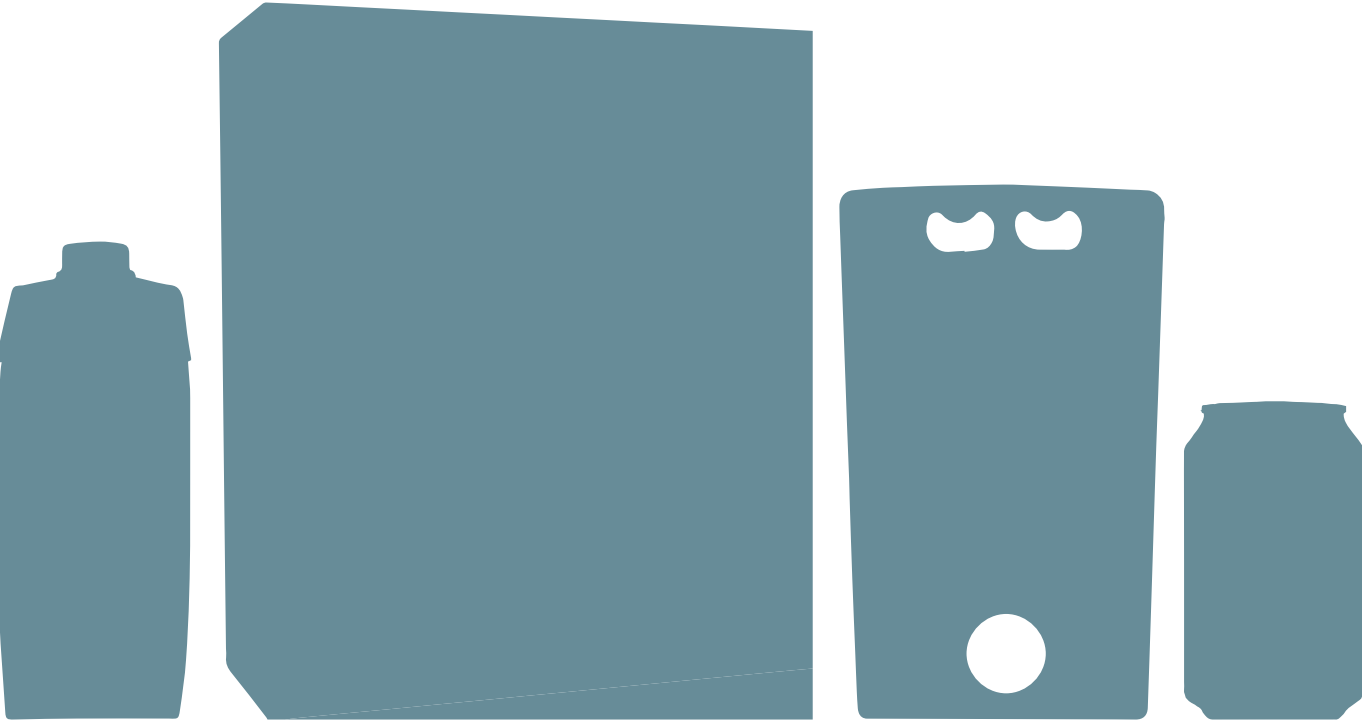
Categories often have a default format

Wine has it's own 80/20 rule



Generally, wine is

- 750ml bottles



Various formats are helping differentiate by occasion:

- Tetra packs
- Boxed
- Bags
- Cans

Building a framework

Categories often have a default format

What does cider look like?



Building a framework

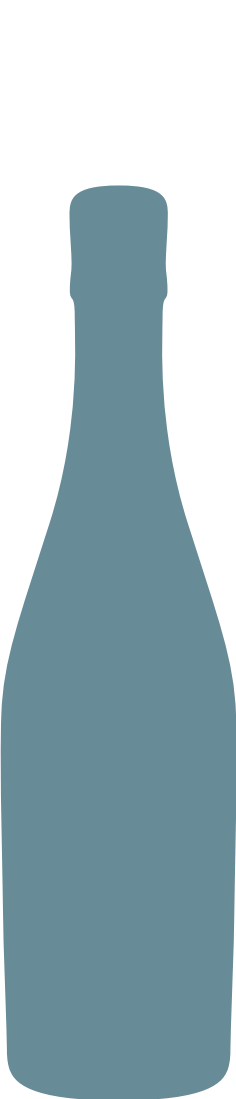
Categories often have a default format

What does cider look like?



Do categories have a format?

**Cider is diverging
it's formats with some
strong associations**



Heritage

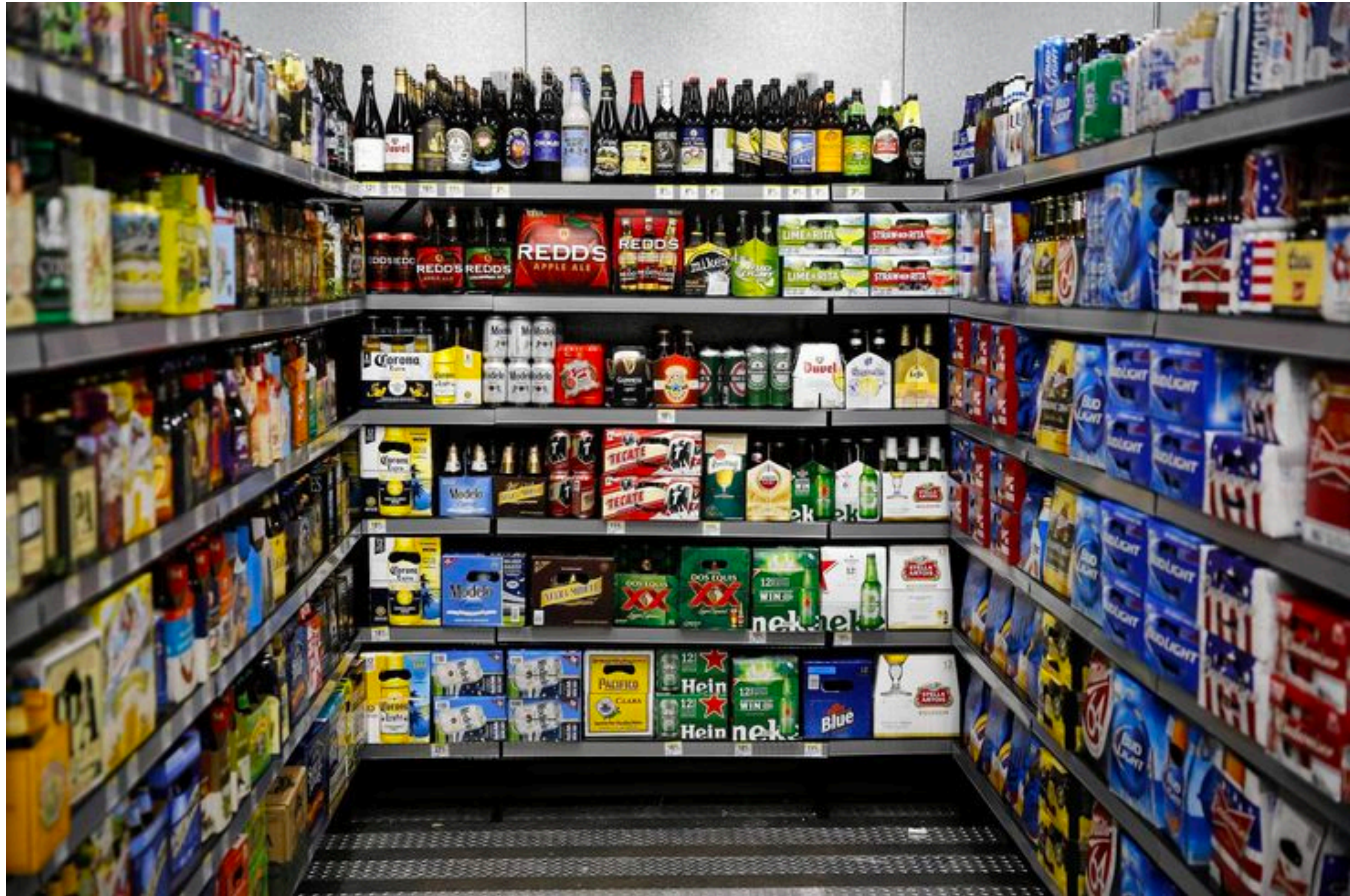


Ice Cider



Craft Cider

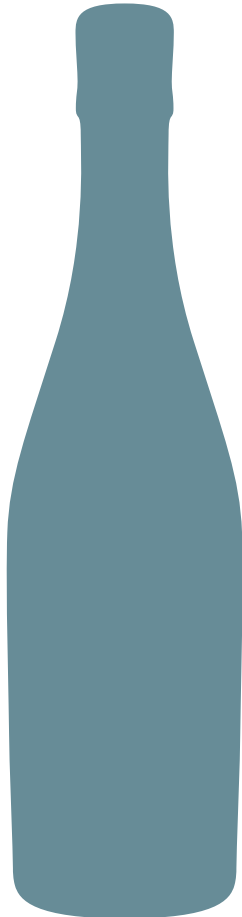






Do categories have a format?

**Cider is diverging
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Heritage



Ice Cider

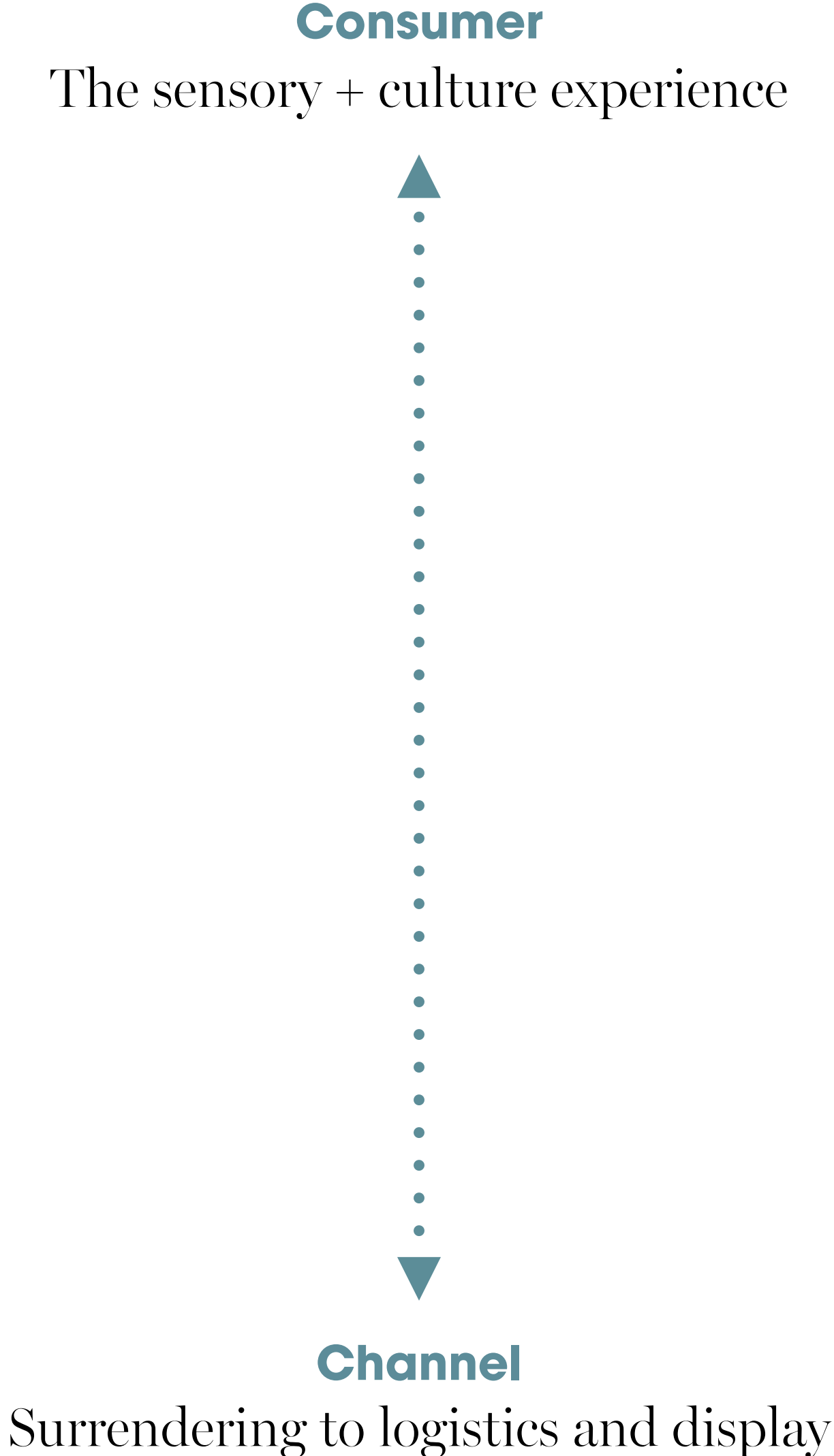


Craft Cider

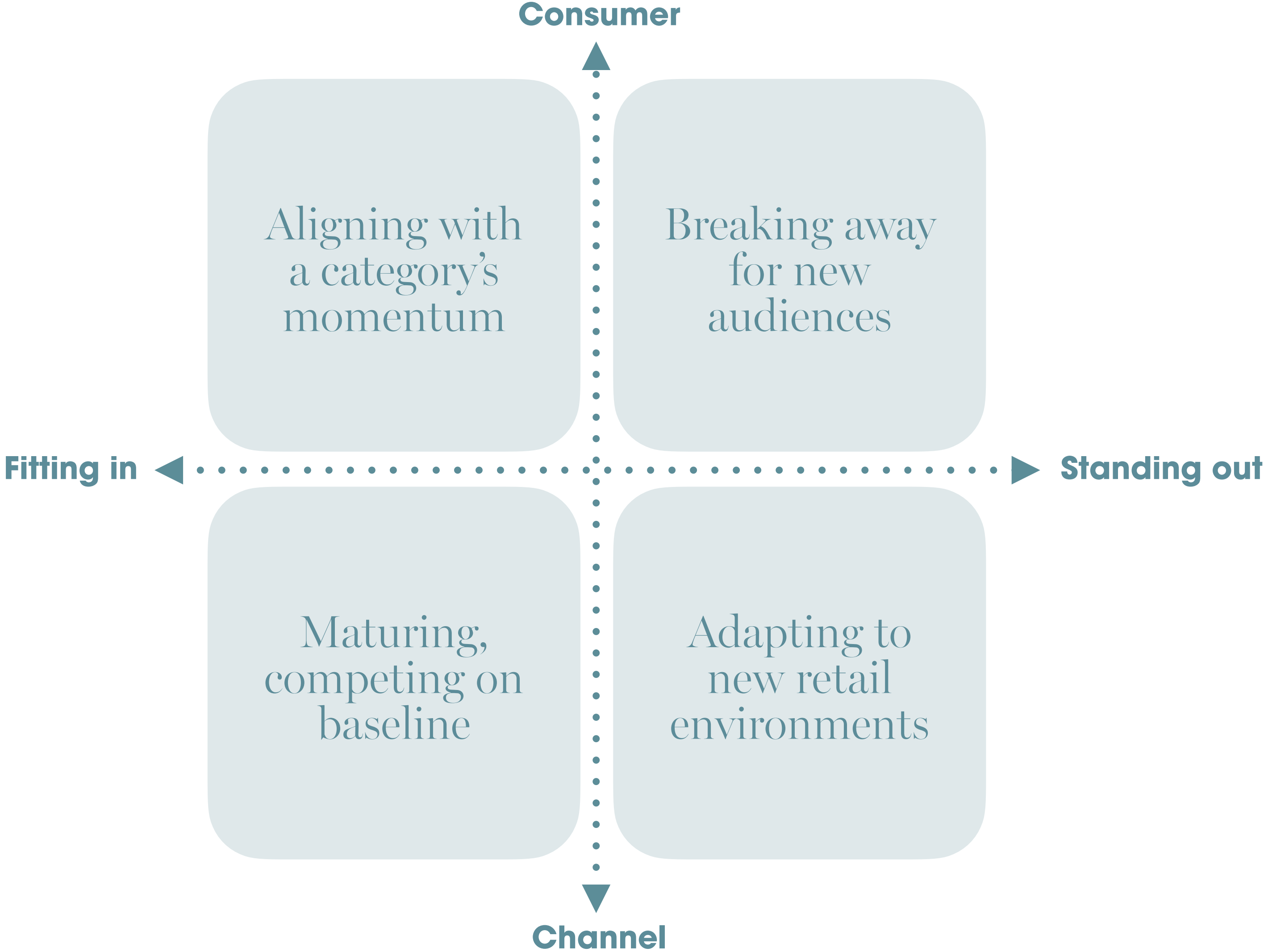
Fitting in vs Standing out



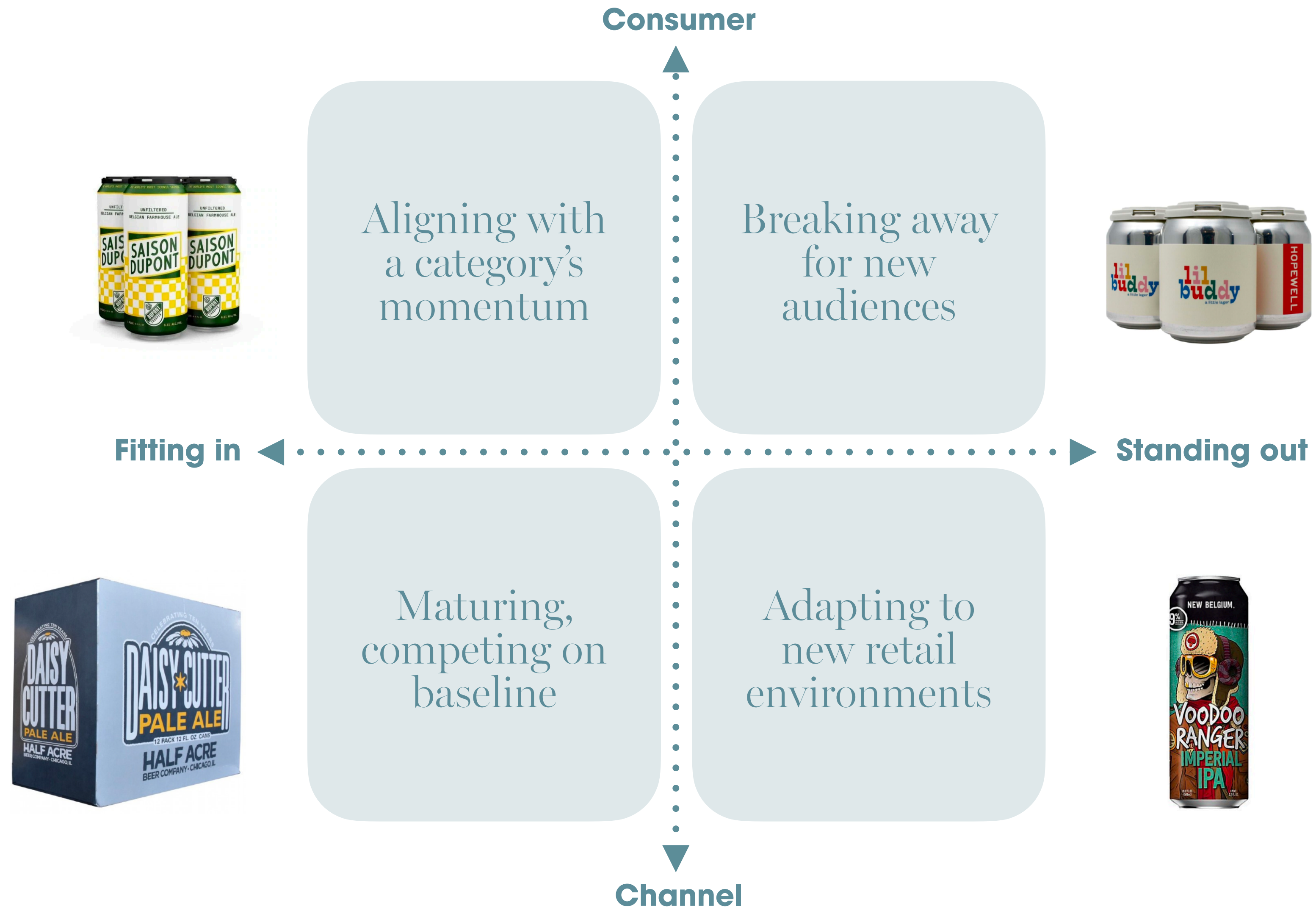
Consumer vs Channel Expectations



A framework for brand and packaging position



A framework for brand and packaging position



Portfolio strategy

Different footprints



Branded House

A specialized maker focused on variety within a single product category

Characteristics

- Doesn't disrupt channel logistics, consumer experience
- Marketing expense
- Temporary

← Vs. →



House of Brands

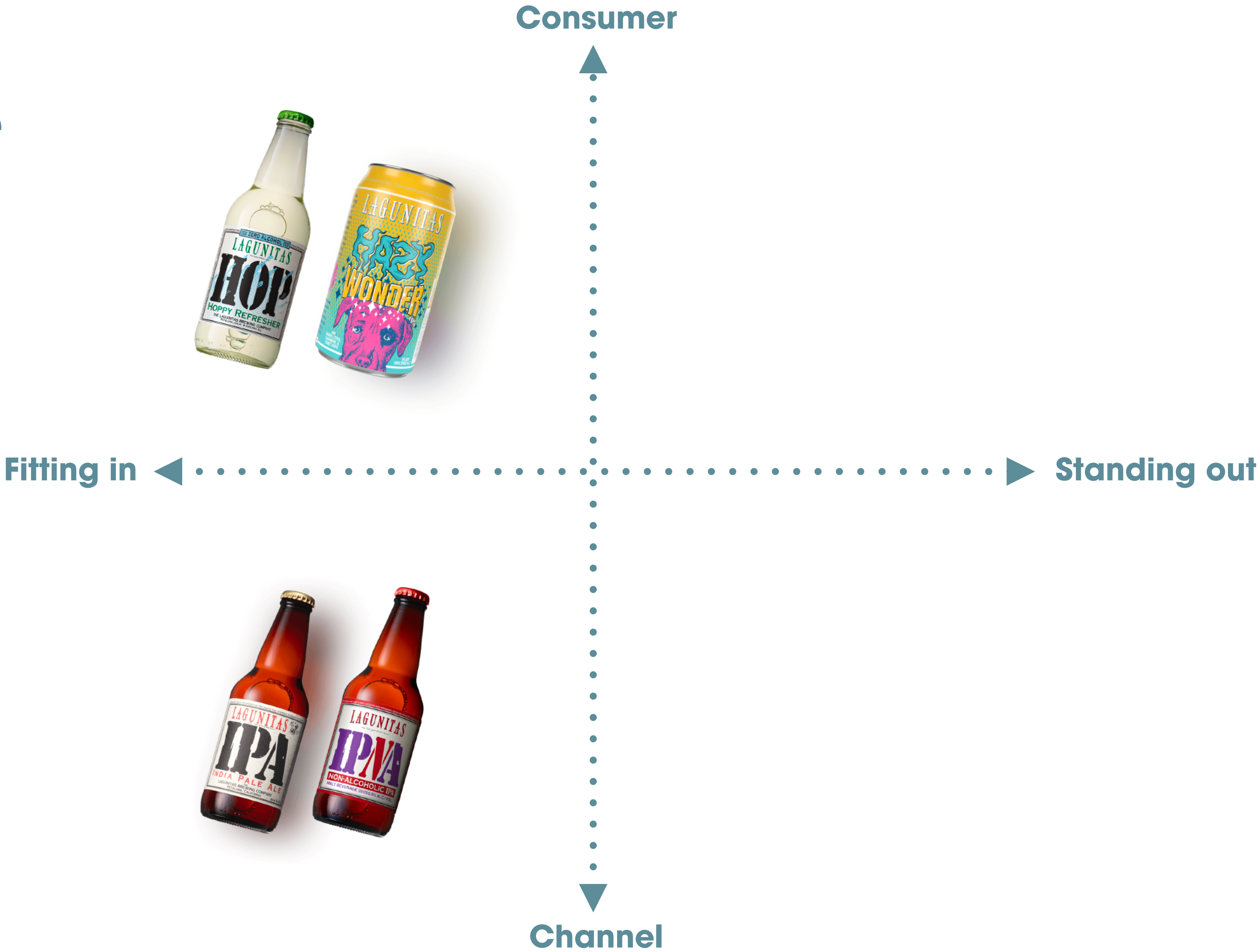
A lifestyle supplier with a variety of brands, formats, and categories

Characteristics

- Aligned with brand position
- Long-term investment
- Part of product experience in a meaningful way

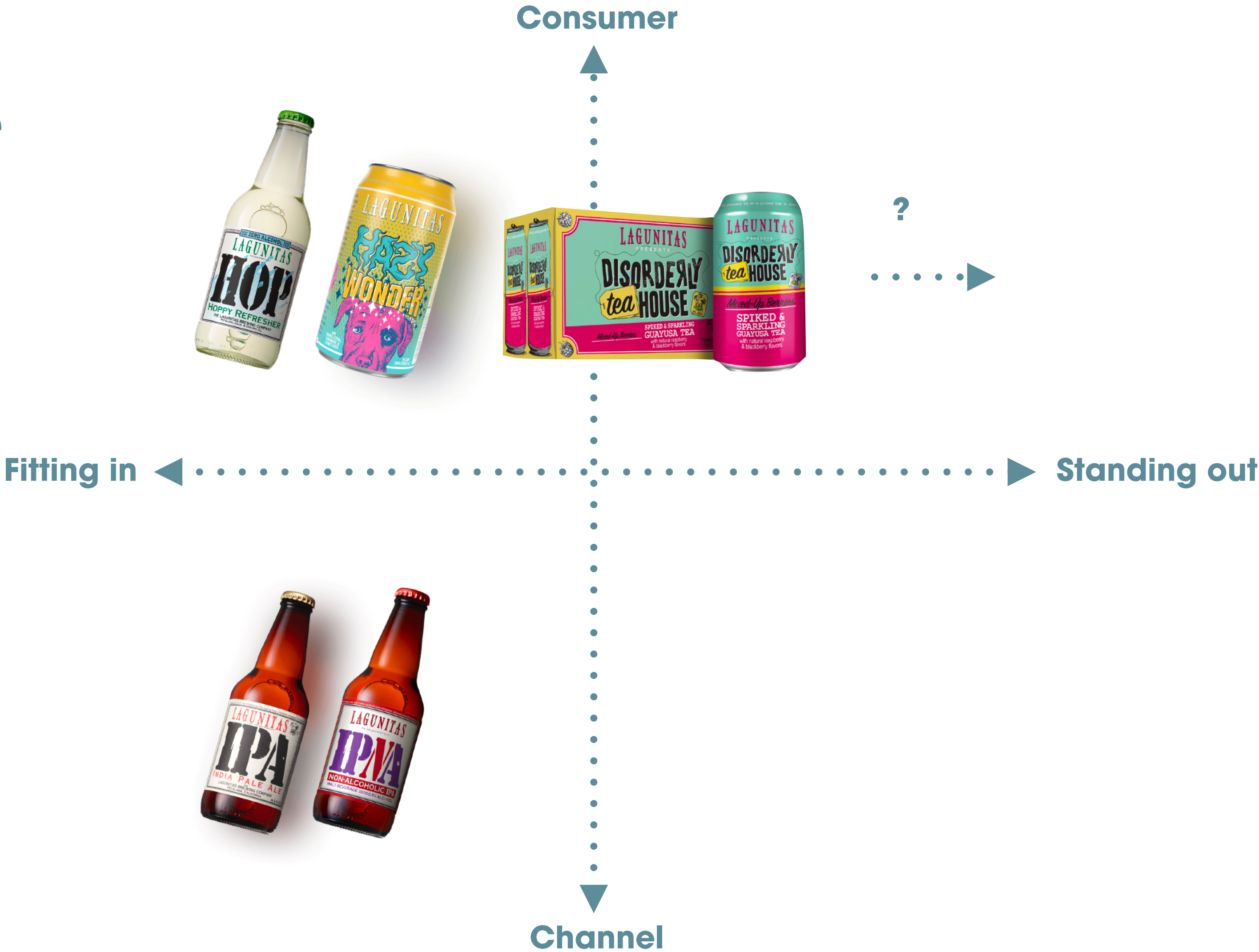
Different footprints

Branded House



Different footprints

Branded House



Different footprints

Hybrid/Emerging house



Consumer



Channel

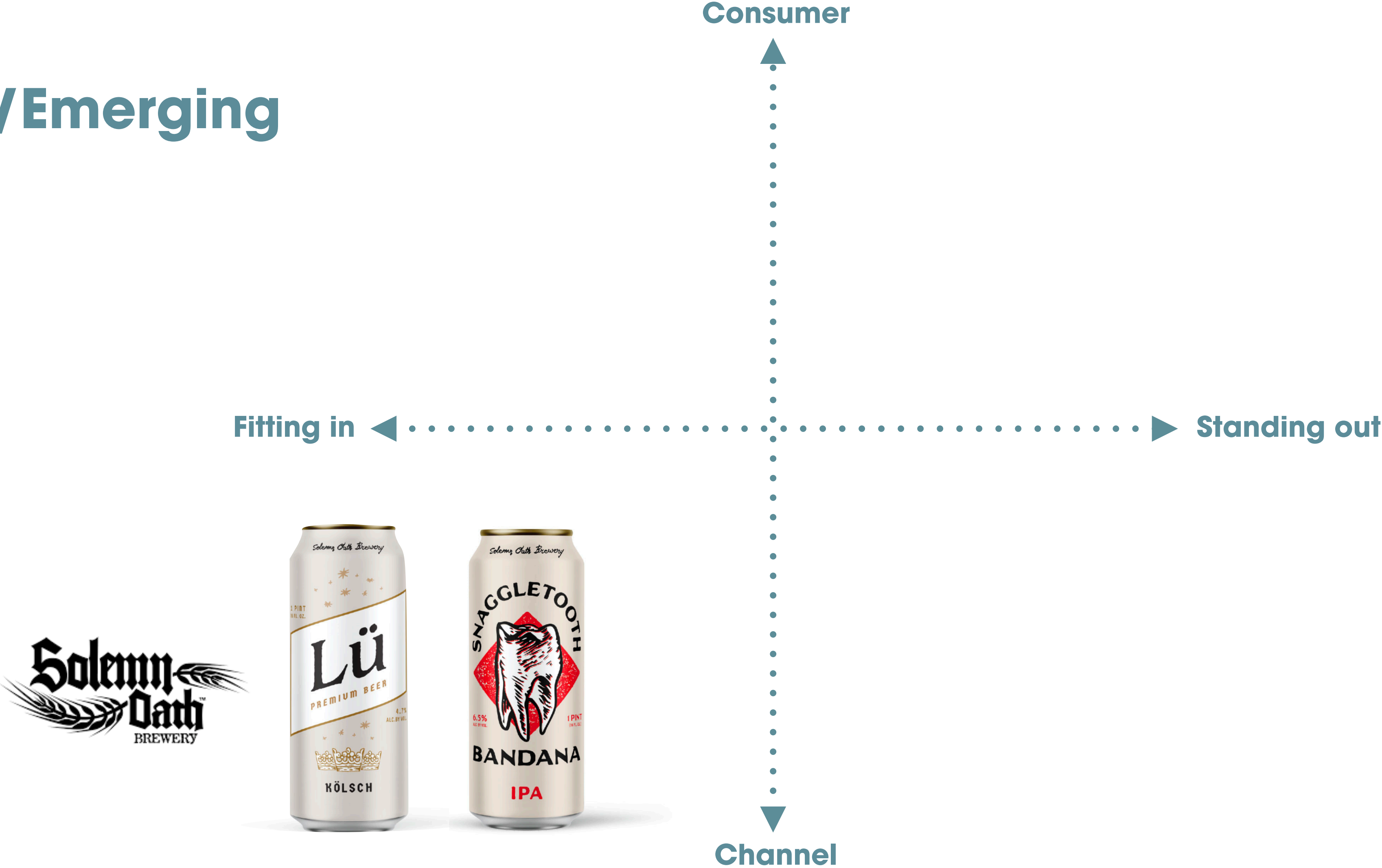
Fitting in



Standing out

Different footprints

Hybrid/Emerging house



Different footprints

Hybrid/Emerging house



Consumer

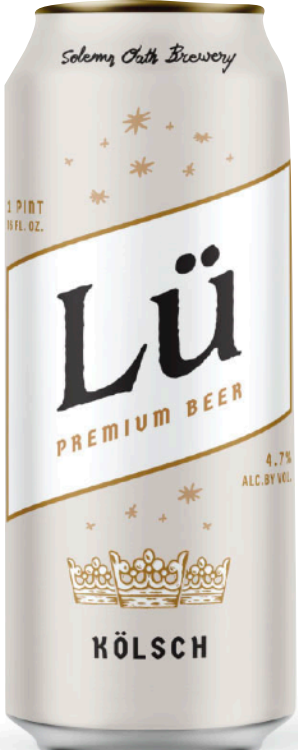


Channel

Fitting in

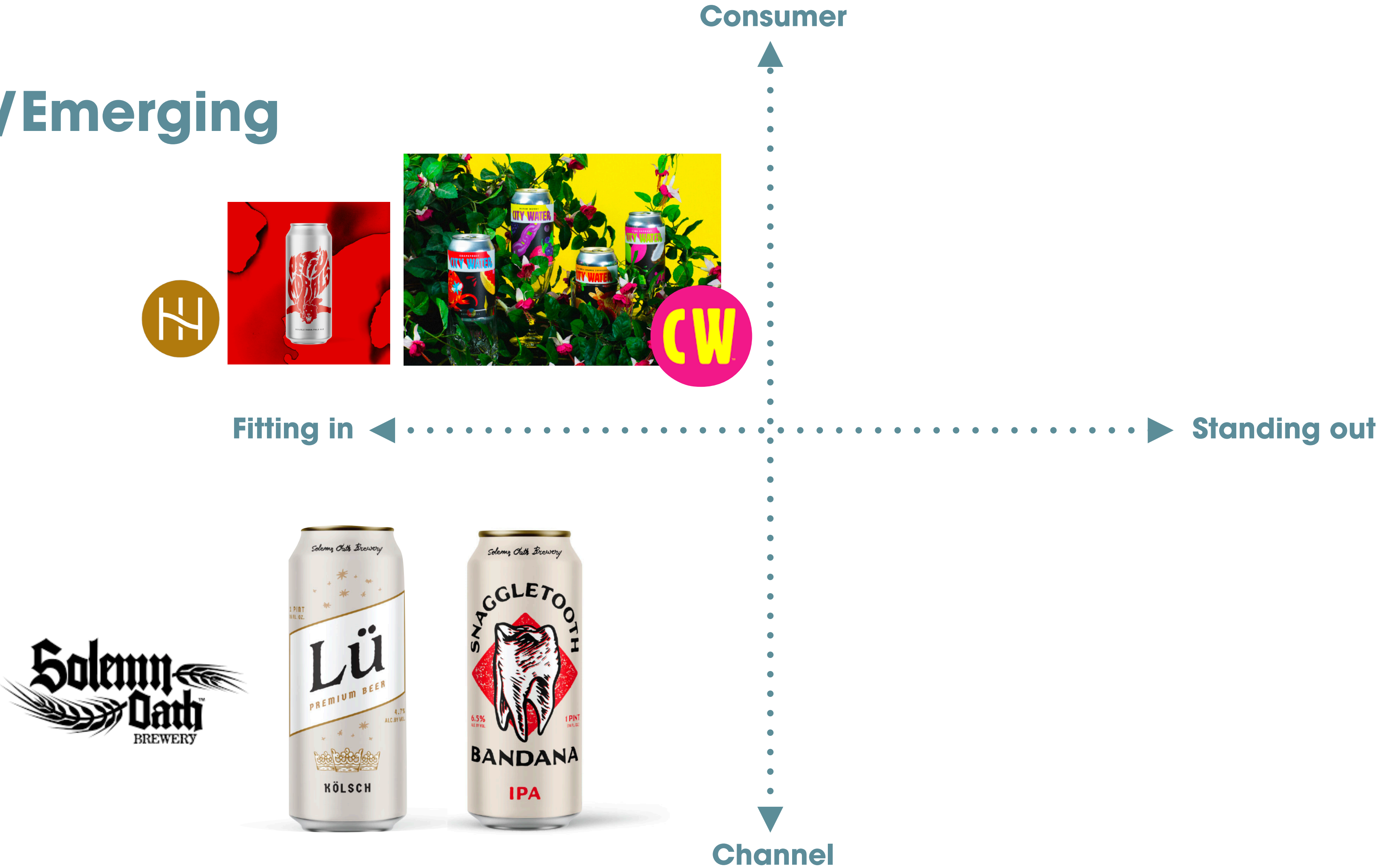


Standing out



Different footprints

Hybrid/Emerging house



Different footprints

House of Brands



DOMINGA

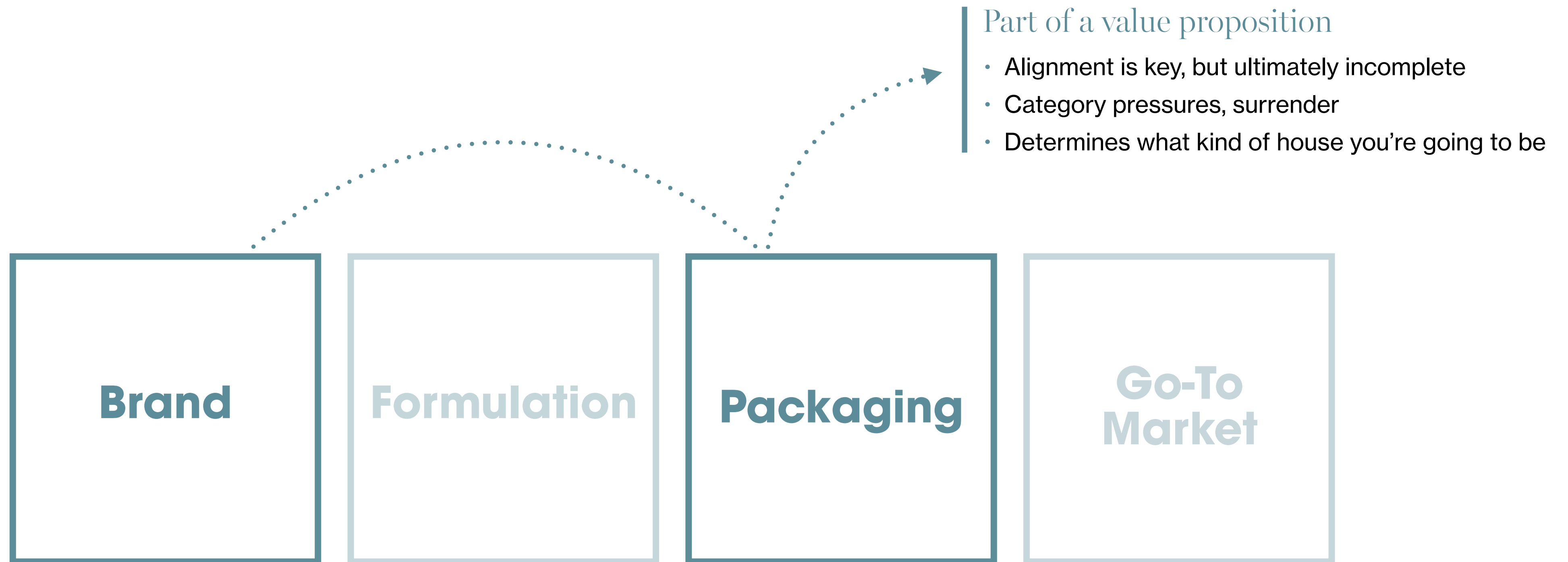




**Let's
recap**

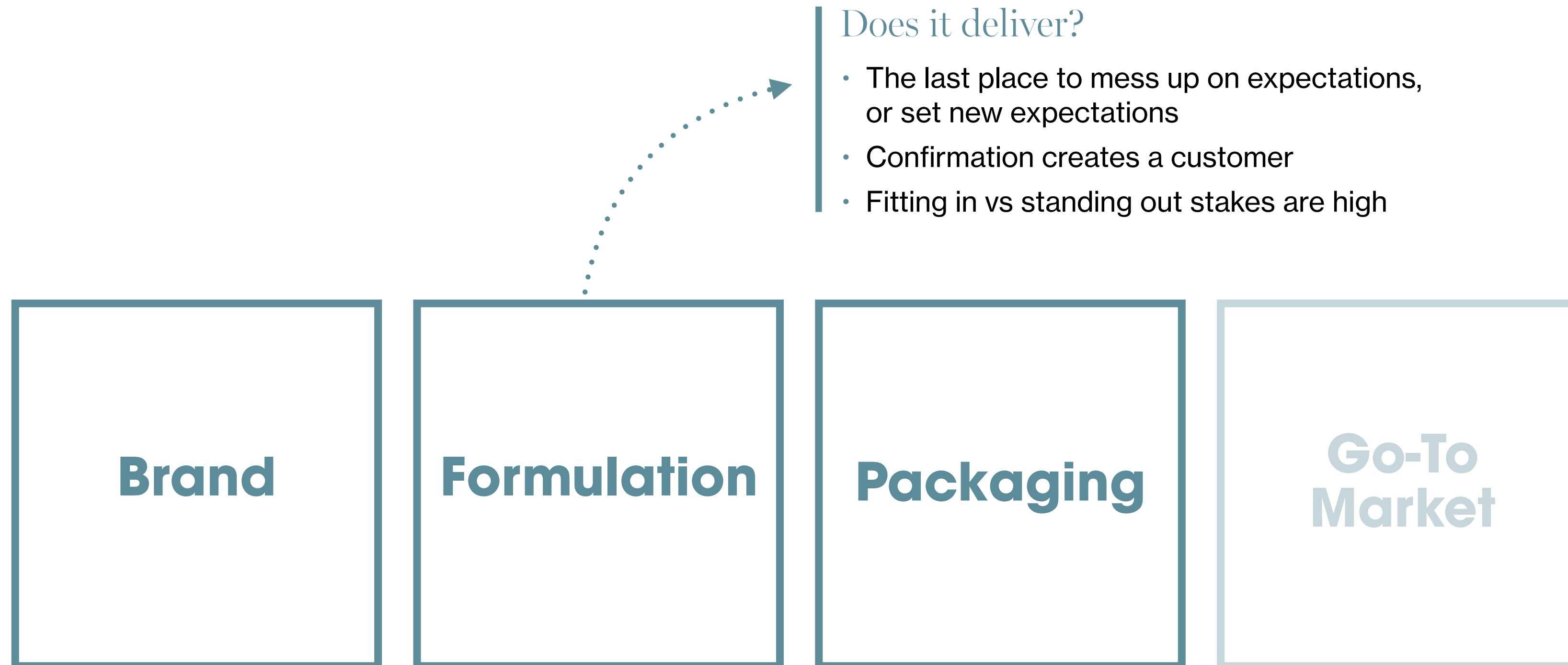
Let's recap

The holistic picture



Let's recap

The holistic picture



Let's recap

The holistic picture

Aligning the value chain

- Setting expectations
- Your storytellers
- Your placements
- Clarity of brand and approach



Brand

Formulation

Packaging

**Go-To
Market**

Let's recap

Sales teams

Formulation regulations

Production competition

Marketing and social support

Wholesaler footprints

DTC

Let's recap

Brand and packaging design:

Fitting in vs Standing out

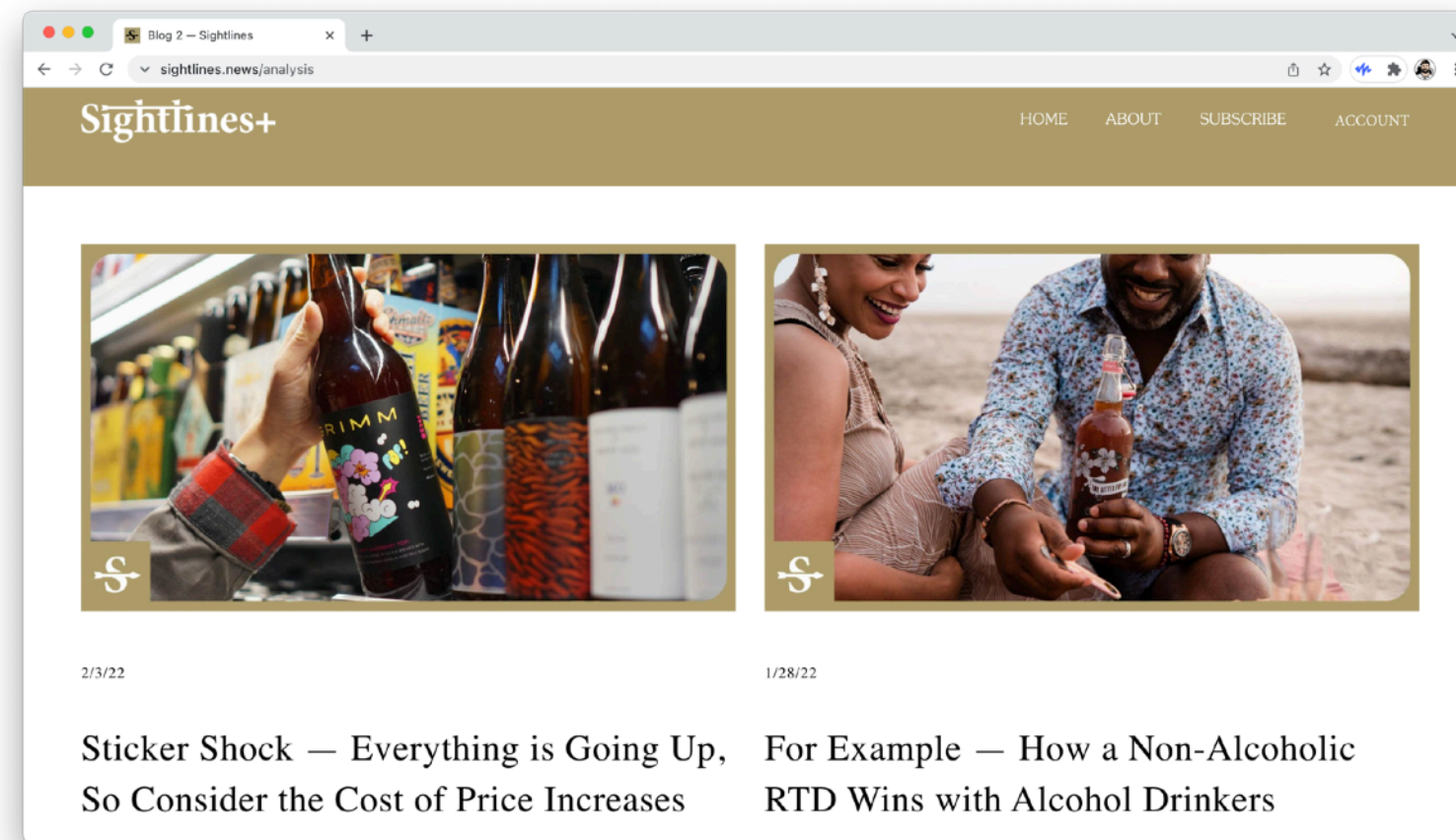
Consumer vs Channel priorities

Branded House vs House of Brands

Implications for go-to-market strategies, resources

Recap

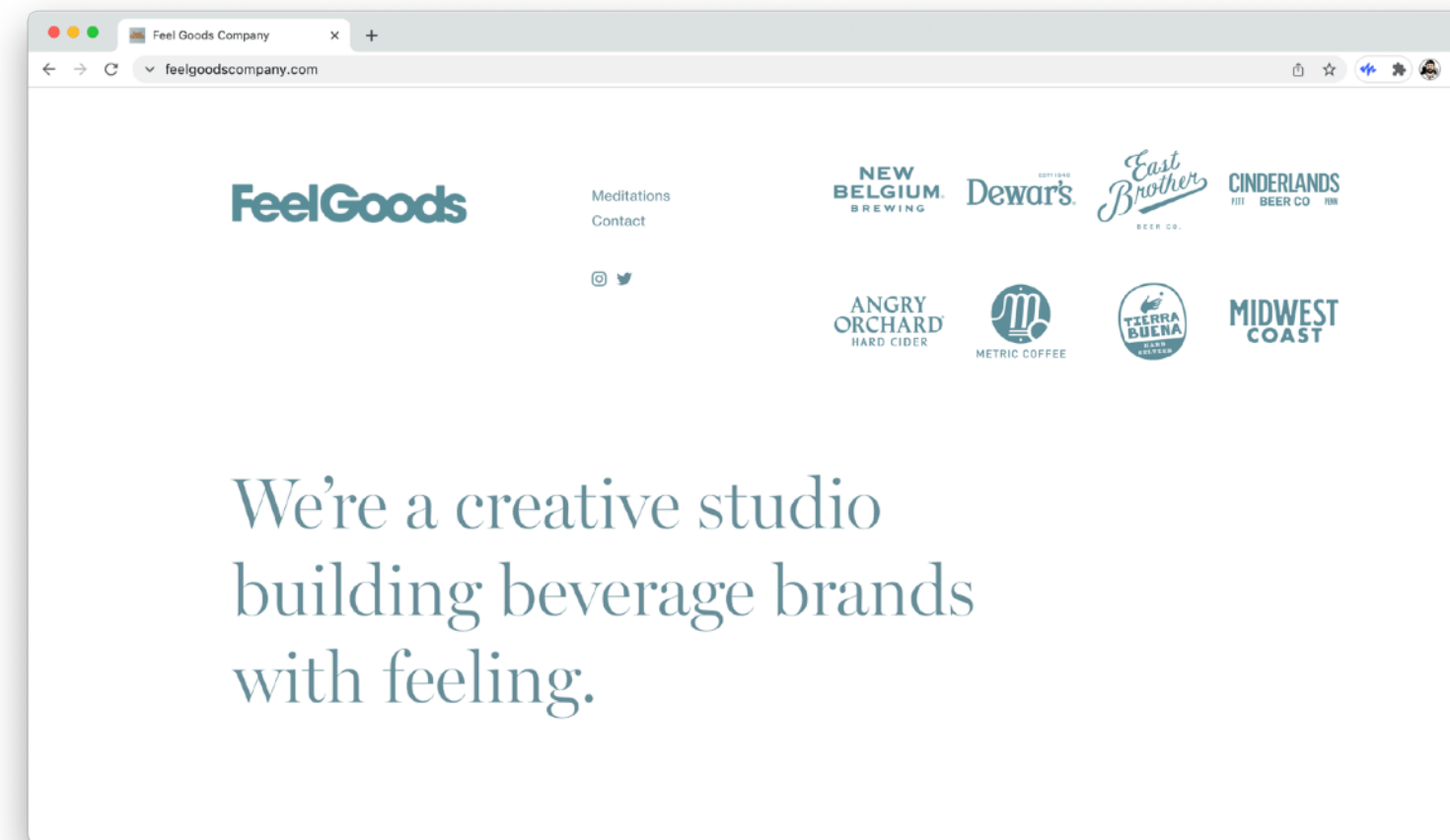
What to do next



Sign up for Sightlines.news

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

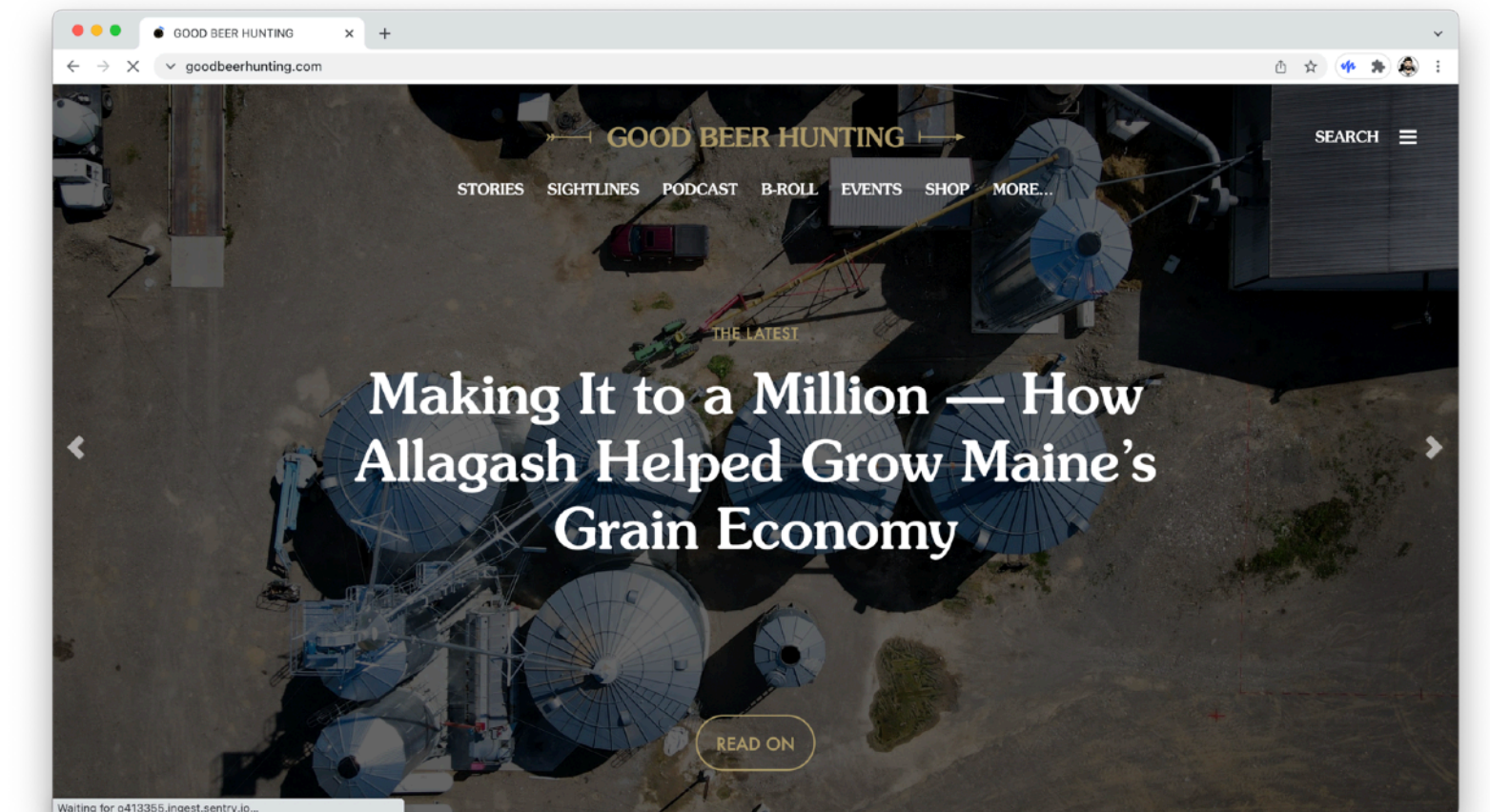
- Subscription newsletter
- Video interviews and strategy sessions
- Professional community
- Bryan Roth and Kate Bernot



Explore the future with FeelGoods

Holistic product and brand development beverage alcohol

- 15+ years of CPG and Bev all experience
- Innovation pipeline
- New brands
- Michael Kiser and Chase Brooks



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