

Marketing Mead



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National Honey Board

Industry-funded agriculture promotion group that works to educate consumers and food and beverage processors about the benefits and uses for honey.

Research, marketing, advertising and promotional programs.

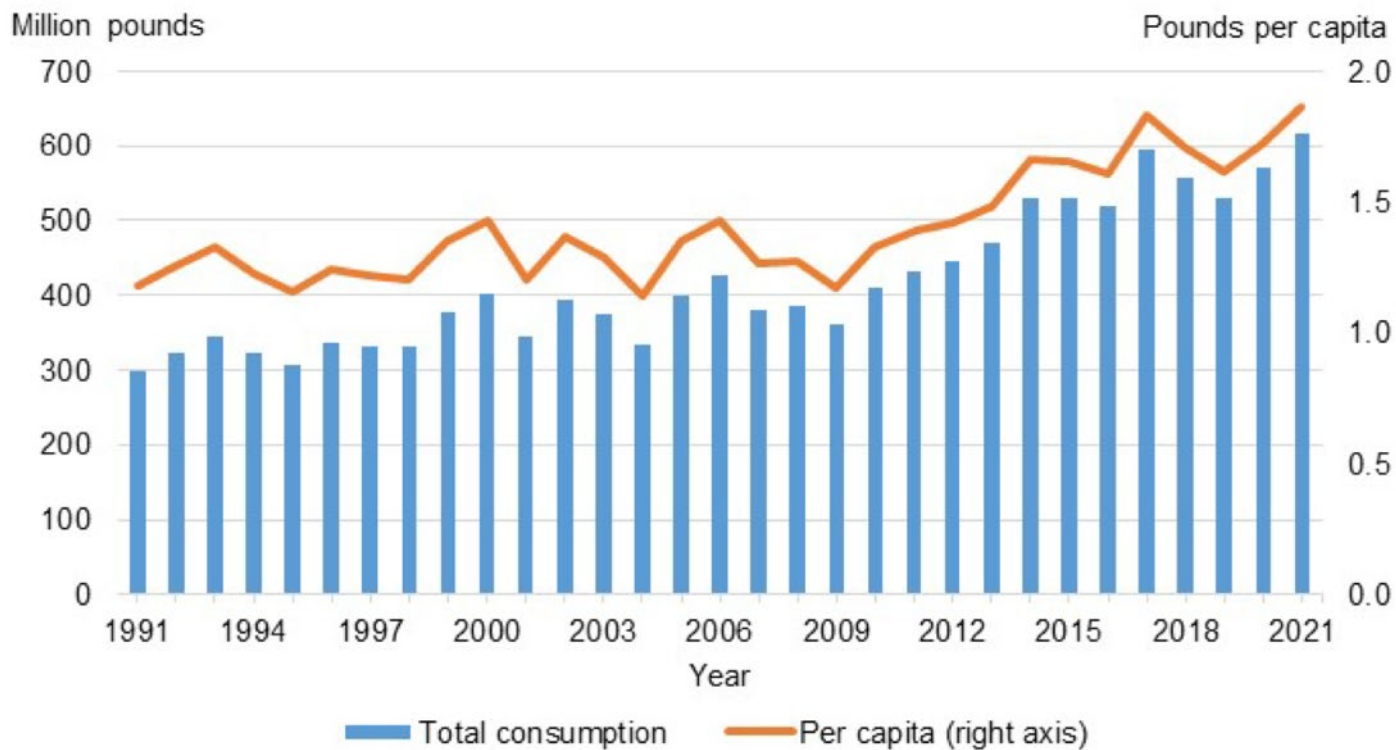
Ingredient Marketing Program

- Traditional: Bakery, Candy, Snack, Beverages
- Alcohol: Beer, Spirits and Mead

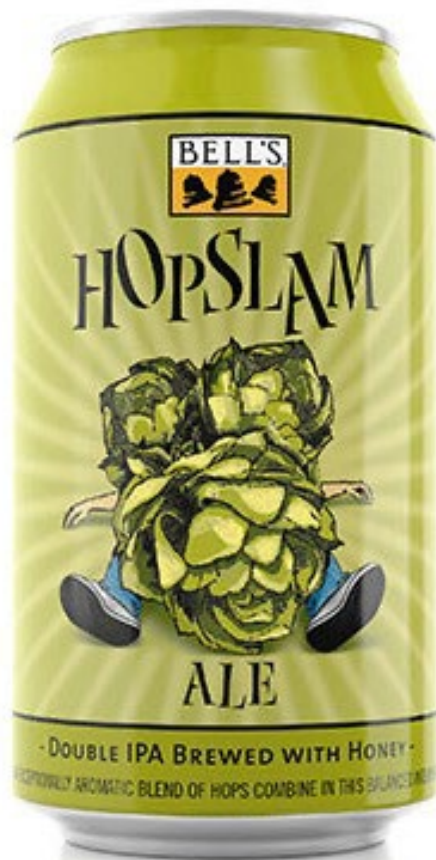


Figure 16

U.S. honey consumption, 1991–2021









2022 MEAD CRAFTERS COMPETITION



Best of Show: Gold

Gin Barrel Mead
The Brimming Horn Meadery
Milton, DE



Best of Show: Silver

Elderberry Mead
WyldeWood Cellars
Peck, KS



Best of Show: Bronze

Raspberry
WyldeWood Cellars
St. Joseph, IL

What is a brand?

A brand is a name, term, design, symbol or any other feature that identifies one seller's goods or service as distinct from those of other sellers.

American Marketing Association

The dominant trend in the craft beer industry in the last several years is sku reduction and putting marketing efforts behind a small group of core brands.



What is marketing?

Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

American Marketing Association

“May you ditch malt-based hard seltzer for one with **real** vodka and **real** juice.”



Branding and marketing are uniquely yours. But...

What's trending in the alcohol industry?

- Looking at recent successes as pathways for success for mead

What are consumers are saying about mead?

- What are they also saying about honey?

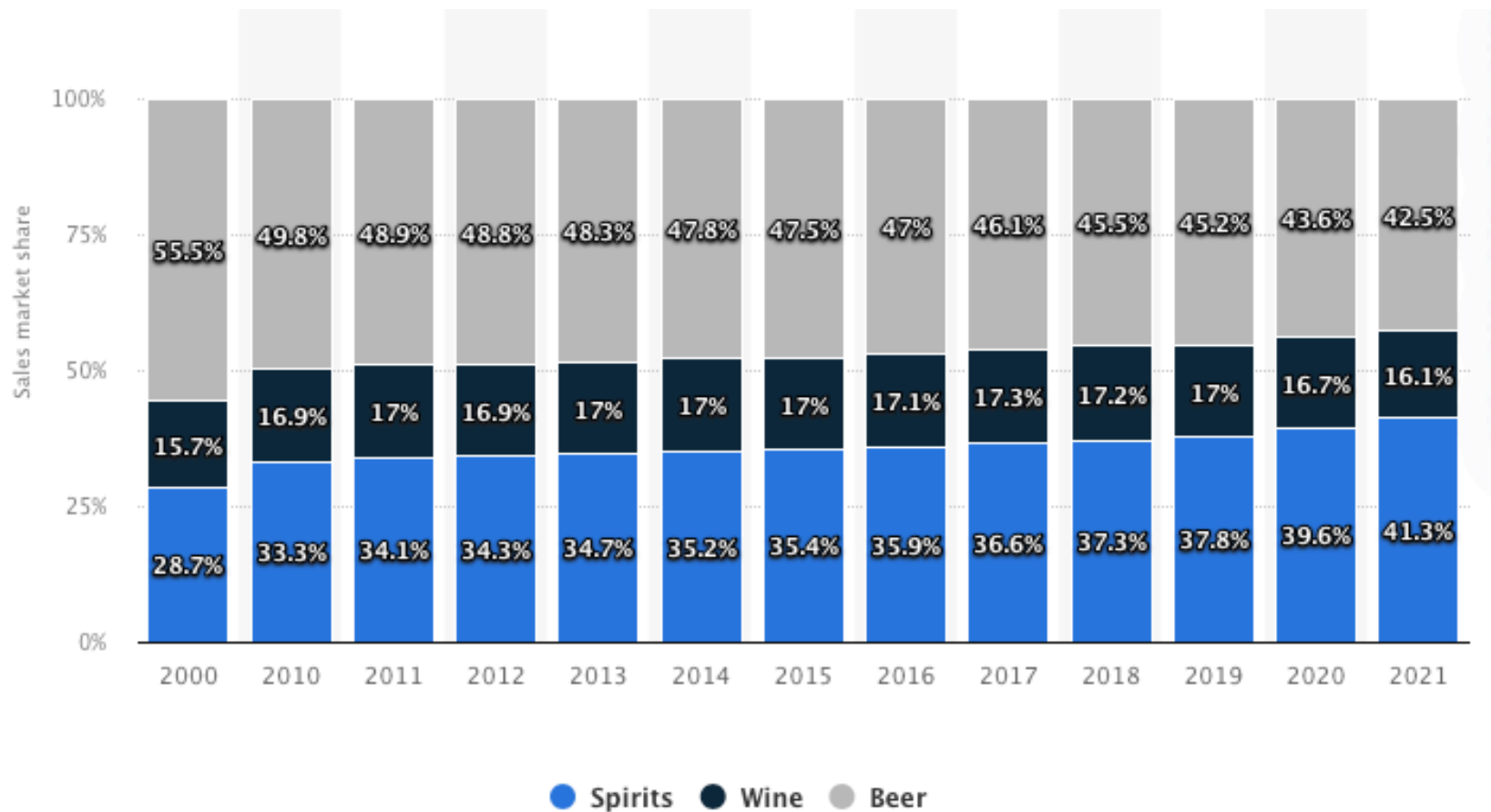
What are mead makers saying about the category?

- A rising tide lifts all boats....

What sommeliers and beverage directors are saying about mead?

what's trending in the alcohol industry







“The alcohol beverage consumer wants more choice and wants different beverages for different occasions. Craft brewers will need to pivot and be more nimble about bringing products to market that are in the beer-adjacent space.

And whoever stumbles upon the next big thing will catch lightning in a bottle.”

Nico Freccia, co-founder of 21st Amendment Brewery.

“The Next Big Thing”

Craft Beer



Hard Sodas and Root Beers



Hard Seltzers



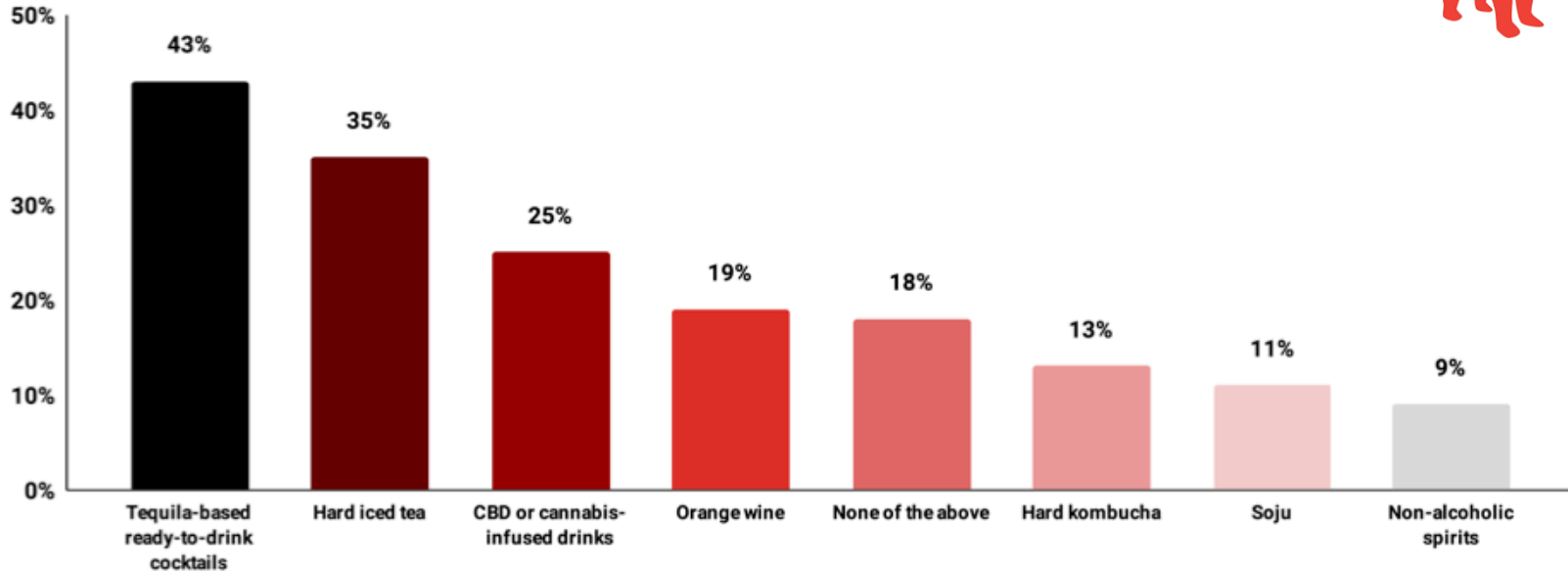
RTD Cocktails

and Spirits-Based Seltzers

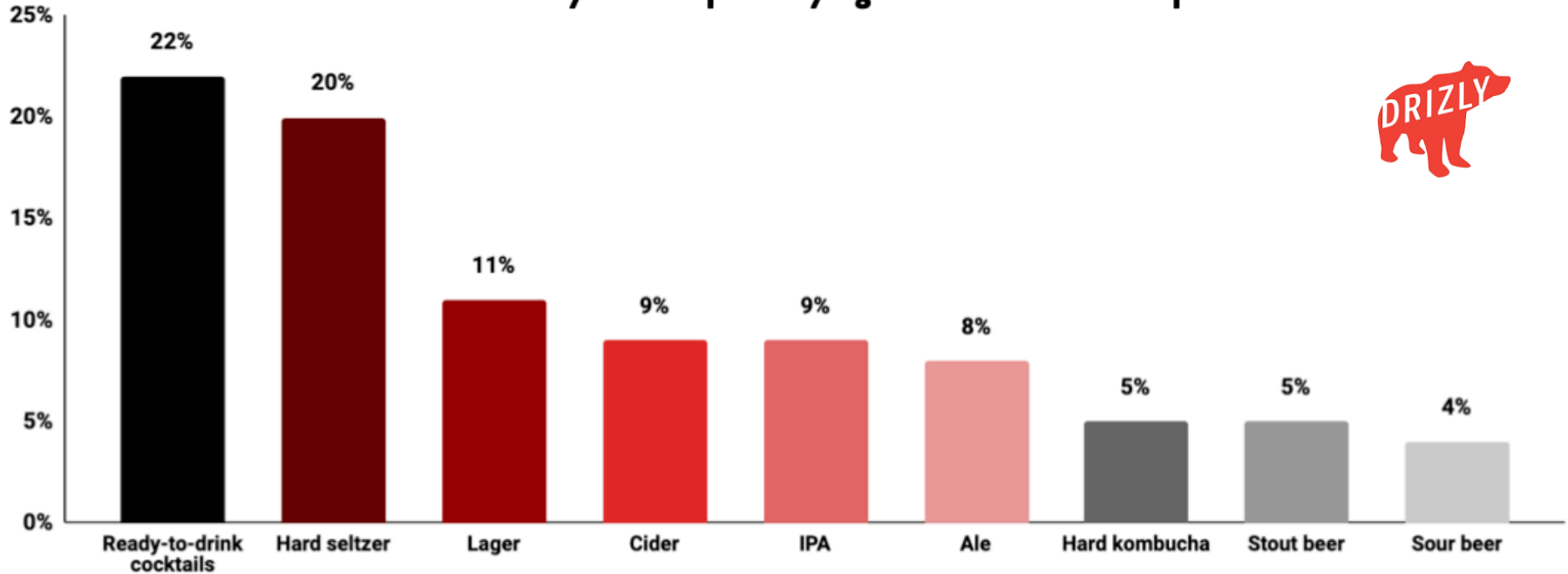


?

Which of these emerging categories are you most interested in?



Which canned drinks do you anticipate buying more of in 2022 compared to 2021?

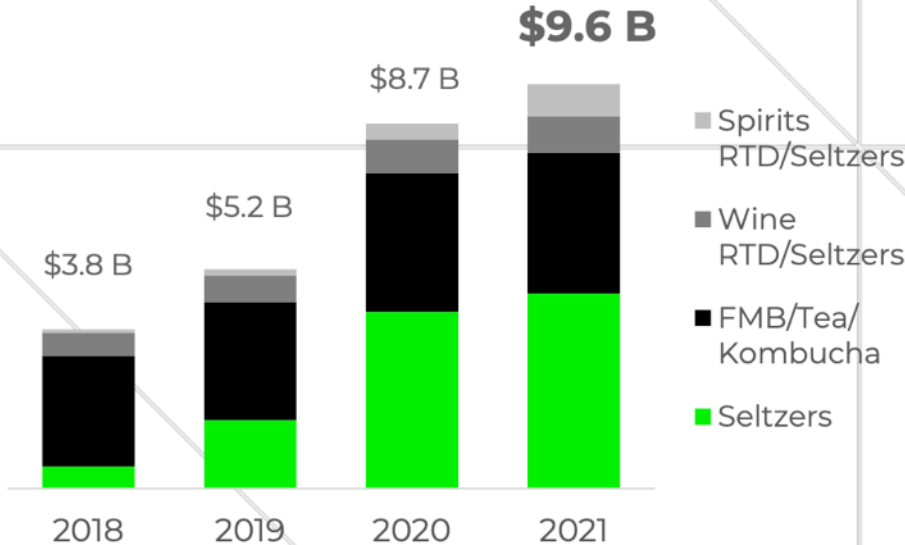


Spirits-based seltzers and cocktails led growth across all RTDs

Core consumer drivers: Convenience, Flavor, Better for You

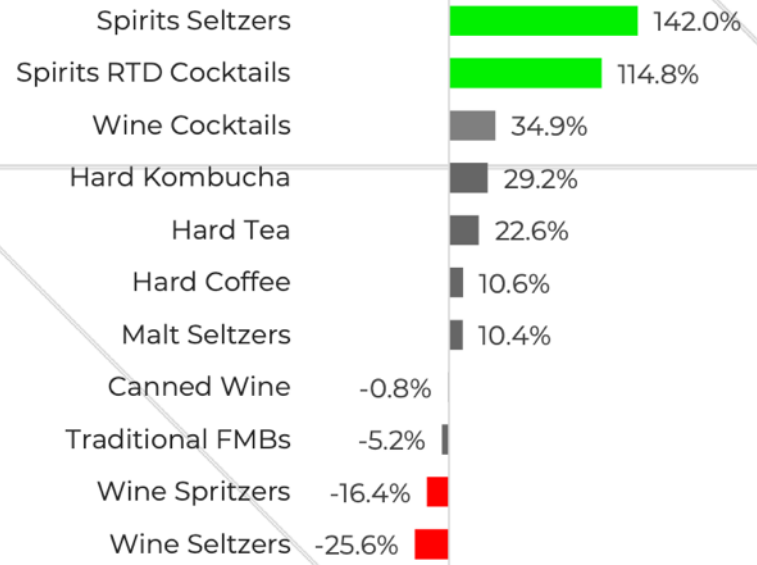
Ready-to-drink dollar sales

NielsenIQ off premise channels



Ready-to-drink dollar growth

NielsenIQ off premise channels



Source: NielsenIQ Scan Off Premise Channels; latest 52 weeks ending 1/8/2022



The Seltzer Slayers: RTD Cocktails and Spirits-Based Seltzers

Why the shift?

1. The “next big thing”
1. Health perception
2. Platform for innovation

What’s missing?

All of the key reasons why consumers buy food and beverages:

- Taste
- Price
- Healthfulness
- Convenience
- Sustainability

the “next big thing”



MAKING MEAD THE “NEXT BIG THING”

1. Why aren't people drinking more mead already? Awareness or availability?
2. Branding and marketing: What's in a name and on the bottle.
3. Finding a focus

Why aren't people drinking more mead?

What Mead Makers Say

Rank the challenges to increased mead consumption?

1. General awareness
2. People think mead is always sweet
3. Uneven quality of mead on the marketplace
4. Price
5. Limited availability on restaurant menus / wine lists
6. Competition from other categories
7. Limited shelf space at liquor / grocery stores

Why aren't people drinking more mead?

What Consumers Say:

What would encourage you to purchase more mead?

- 47.3% If it was available where I purchase / drink alcohol
- 40.9% If it was priced comparably to what I usually drink
- 36.1% If I could purchase a sample pack
- 34.5% If I knew more about it
- 28.7% If it tasted different
- 7.6% If it was served in a can

Why aren't people drinking more mead?

What Sommeliers and Beverage Directors Say:

Why is mead not served at most restaurants and bars?


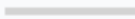
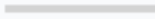
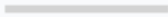

- The mead industry does not engage with beverage professionals
- We need education about your products and story
- We need to understand the mead industry's knowledge about marketing around food and mead pairings
- We need ideas for cocktail programs and tasting flights

WHAT'S IT ALL MEAN?

1. Awareness is not the biggest challenge for mead. Availability is across all distribution platforms.
2. Engagement with beverage directors, sommeliers, liquor store owners is key for growth of category.
3. Quality is an issue in the mind of mead makers, but not for most consumers and beverage professionals.

Making mead the “next big thing”

Branding: What’s In the Name?

Honey Wine		51.10%
Wine Made with Honey		31.94%
Craft Honey Wine		36.33%
Craft Mead		39.92%
Fermented Honey Wine		16.57%

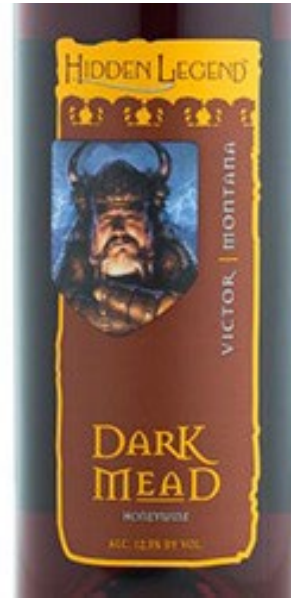
Which label is most appealing to you?



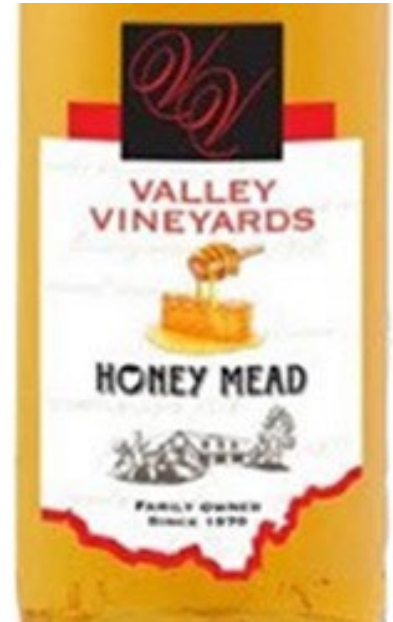
34%



26%



23%

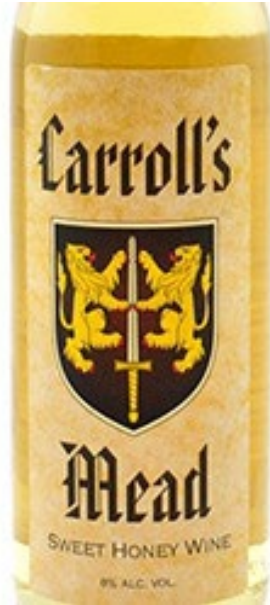


17%

Which label is most appealing to you?



38%



25%



23%



14%

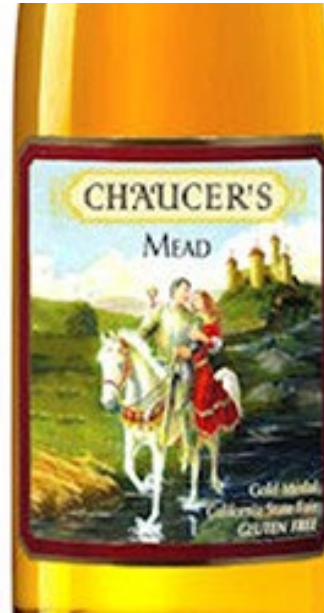
Which label is most appealing to you?



32%



26%



25%



17%

Top 3 Most Appealing Labels



1



2



3

Honey is having a moment

Recent USDA report on honey consumption just released.

Countless surveys (internal and external) rank honey as the clear consumer preference for sweeteners.

Explosive growth in food and beverage products made with honey.

DIVE BRIEF

US honey consumption soars to all-time high amid better-for-you trend

Published Aug. 18, 2022



[Christopher Doering](#)
Senior Reporter



Sean Gallup via Getty Images

Dive Brief:

- U.S. honey consumption reached a new record of 618 million pounds in 2021, up 8% from the previous year and topping the previous high of 596 million pounds four years earlier, [according to the USDA](#).

health perception



Hard Seltzers hit on many specific health related attributes, BUT...Wine perceived as a healthier alternative overall



	Wine	Beer	Spirits	Hard seltzer	None of these
Is low calorie	10	9	9	24	56
Is low carb	11	7	14	21	56
Contains less sugar	9	13	14	21	52
Is a good option when dieting or watching what I eat	18	4	9	18	59
Is healthier than most alcoholic beverages	34	6	5	13	48
Is lower in alcohol	14	23	1	22	47

Q21. Which type or types of alcoholic beverages, if any, would you most closely associate with each statement? Please select as many types of alcoholic beverages as apply... Wine Market Council – Health & Wellness Nielsen Homescan Panel Survey (Fielded 10/16/2020 – 11/9/2020). Alcoholic Beverage Buyers (n=1933)

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Better for you means different things to different people, but brands connected to consumers seeking healthier lifestyles on the rise

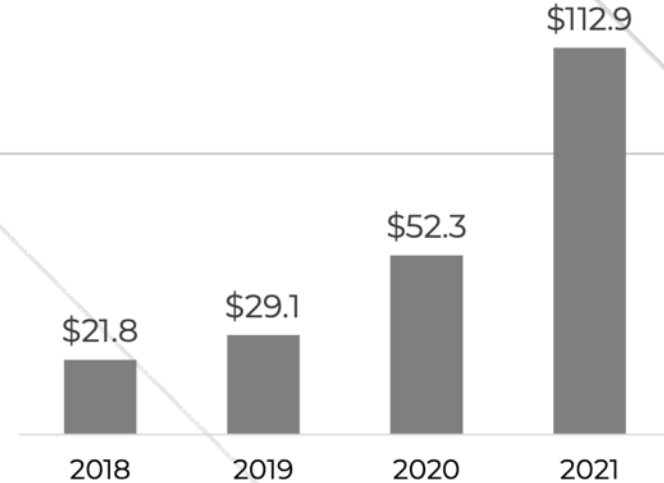
On Label	% Growth vs 2 YAG	\$ Share
<10% ABV	+25%	11.9%
Gluten Free	+110%	1.8%
Organic	+24%	0.8%
Low Calorie	+468%	0.6%
Vegan	+167%	0.6%
Seltzers/Spritzers	+35%	0.3%
Low/No Sugar	+438%	0.3%
Non Alc	+65%	0.2%
Low Carb	****	0.1%

Nielsen measured off premise channels – 52 w/e 1-8-2022

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Selected “BFY” positioned brands – Annual \$MM sales

NielsenIQ off premise channels



Selected brands include:

Avaline; Babe 100; Bev; Bota Box Breeze; Brancott Flight Song; Cupcake Lighthearted; Evenly Fit Vine; Girl Go Lightly; Kim Crawford Illuminate; Lifevine; Liquid Light; Mind & Body; Skinny Dipping; Skinny Fiz; Skinny Freezer; Skinny Vine; Thomson & Scott Skinny; Social; Starborough Starlite; Yellow Tail Pure Bright



WHY JUNESHINE?

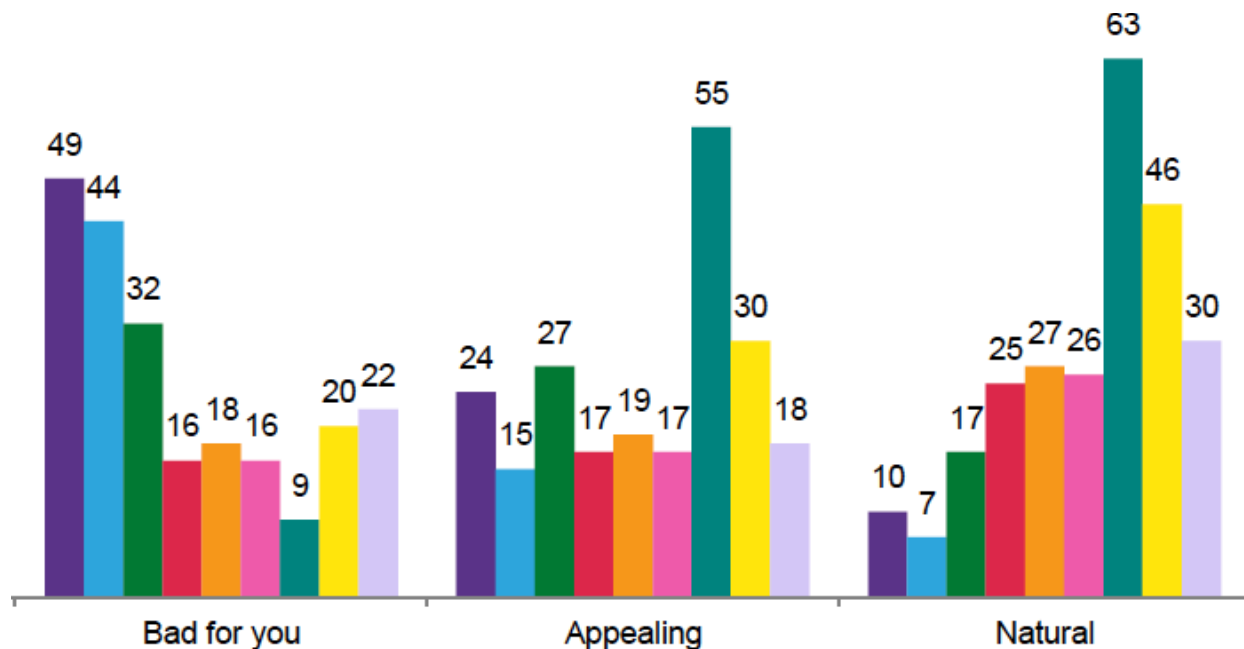
Honest Alcohol

No shady ingredients. No syrupy flavors. Never too sweet.

Hard Kombucha

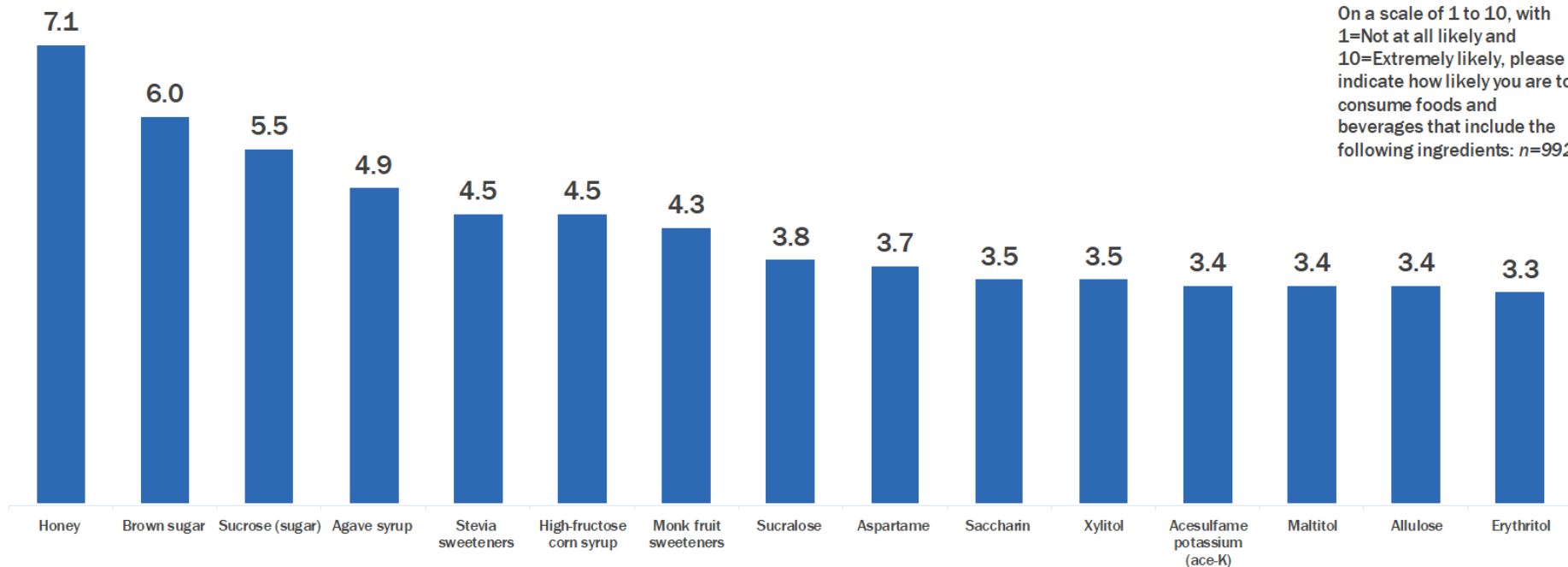
- Organic ingredients
- Low sugar
- Gluten-free
- Gut-Friendly
- Naturally fermented to 6% ABV

Which of the following types of sugar and sweeteners do you think are... Please select all that apply per statement.



- Refined white sugar
- Zero-calorie artificial sweeteners
- Syrups
- Plant-derived sweeteners
- Molasses
- Palm/coconut sugar
- Honey
- Raw cane sugar
- Unrefined/raw sugar

People are more likely to consume foods and beverages with caloric sweeteners over those with low-calorie sweeteners, sugar alcohols and allulose



WHAT'S IT ALL MEAN?

1. Capitalize on honey's momentum in the marketplace, especially if you're crafting a low-abv canned mead.
2. Both traditional and low-abv meads have big opportunities in better-for-you positioning. Don't be afraid to lean into it.
3. Don't be afraid to focus branding on how mead should make you "feel."



FACT OR FACTORY





Stevia

Leaf to augmented powder



Monk Fruit Extract

Fruit to liquid to powder



Brown Rice Syrup

Grain to concentrated syrup



Agave Nectar

Plant to evaporated syrup



Maple Syrup

Sap to highly evaporated syrup



Cane Sugar

Stalks refined into crystals

platform for innovation





Top-Selling Hard Seltzers

1. White Claw Hard Seltzer Variety Pack No. 1
2. TRULY Hard Seltzer Berry Variety Pack
3. White Claw Hard Seltzer Variety Pack No. 3
4. White Claw Hard Seltzer Variety Pack No. 2
5. White Claw Black Cherry Hard Seltzer
6. Topo Chico Hard Seltzer Variety Pack
7. TRULY Hard Seltzer Tropical Variety Pack
8. TRULY Hard Seltzer Punch Variety Pack
9. Bud Light Seltzer Variety Pack
10. TRULY Hard Seltzer Iced Tea Variety Pack

Top-Selling Ready-to-Drink

1. High Noon Hard Seltzer Variety Pack
2. High Noon Tropical Variety Pack
3. High Noon Peach Hard Seltzer
4. Cutwater Tequila Margarita
5. High Noon Pineapple Hard Seltzer
6. Skinnygirl Margarita
7. High Noon Watermelon Hard Seltzer
8. High Noon Grapefruit Hard Seltzer
9. High Noon Lime Hard Seltzer
10. On The Rocks Effen Cosmopolitan Cocktail

Fruit and Variety Packs



4
Pack

Fruit and Variety Packs



What Consumers Say:

How would you describe the meads you have tasted

100%	Fruity
70%	Sweet
39%	Semi-Sweet
28%	Spiced
21%	Dry
20%	Carbonated
15%	Spicy
13%	Botanical / Herbal

What types of mead are you open to trying

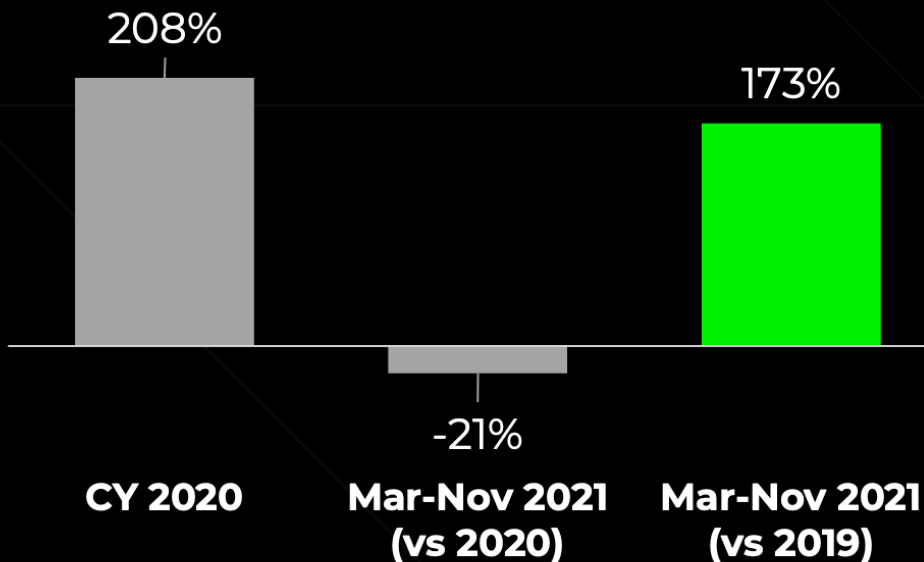
81%	Sweet
80%	Fruity
65%	Semi-Sweet
55%	Spiced
47%	Carbonated
42%	Dry
39%	Botanical / Herbal
37%	Spicy

Online alcohol sales 2.7x pre-COVID levels, though down vs the huge increases in the early months of the pandemic



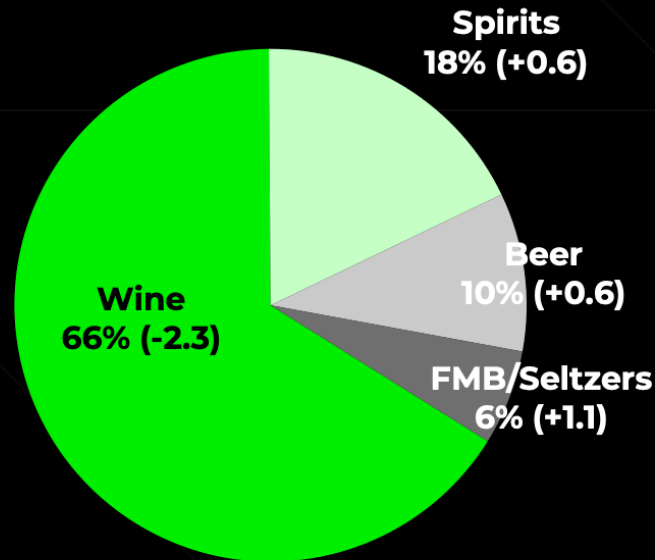
Online alcohol sales

Dollar percent change vs year ago



Share of ecommerce

Dollar share of ecommerce & change vs year ago



Direct to Consumer Shipments

Total U.S. – 2021


8.5 million Number of 9L cases sold;
+1% vs 2020; 2MM more cases than 2019

\$4.2 billion

+13% vs 2020; +\$1 billion more than 2019

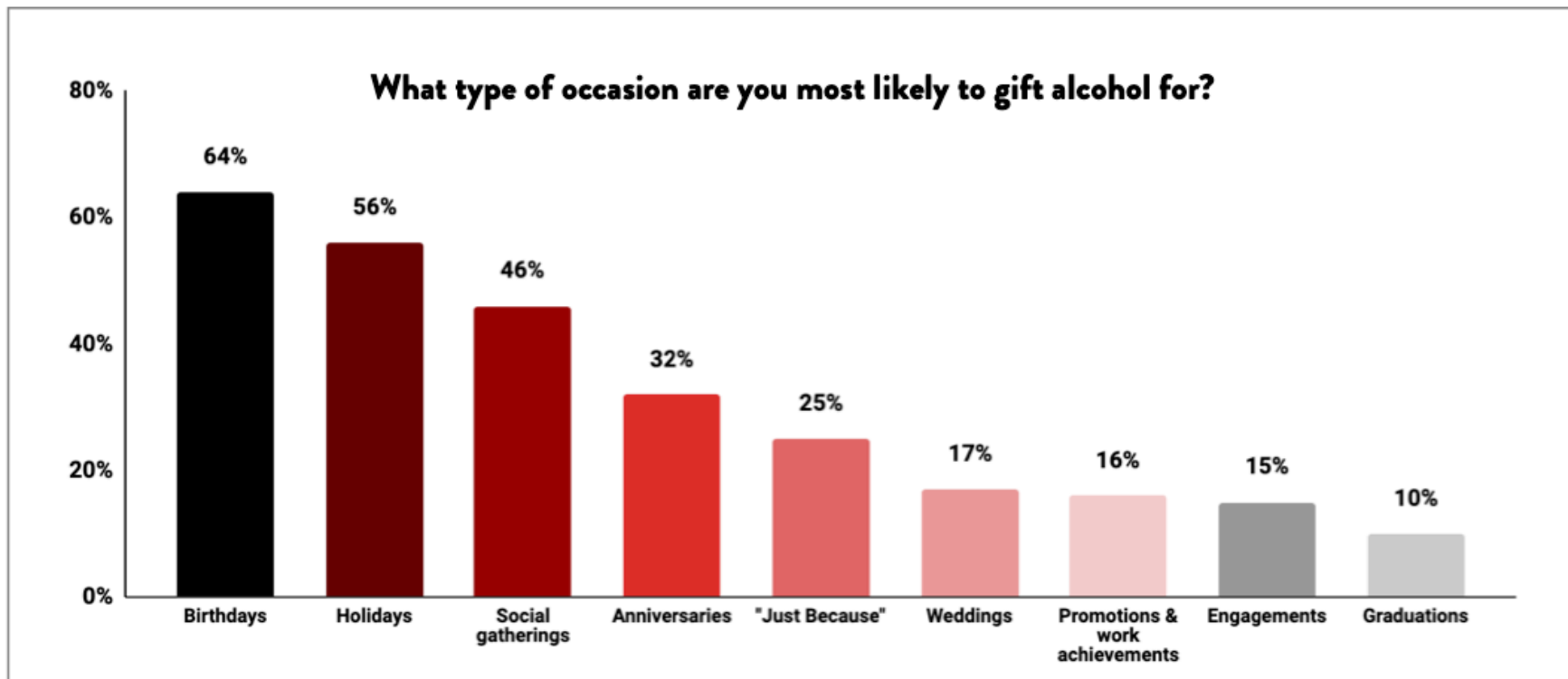
\$41.16

Average price; +\$4.33 vs 2020

 WINES VINES ANALYTICS SOVOS ShipCompliant

**Together with carryout, DTC \$ now
>10% of Wine category \$**





¹⁰Source: Drizly Internal Data, 2020-2021



WHAT'S IT ALL MEAN?

1. Focus marketing and product development on fruit-forward products.
2. Use variety/sample packs to position mead as a category and not a beverage
3. Invest in your online store, optimize it, advertise it and market it
4. Innovate through mead cocktails and collaborations

who should mead be
targeting?



Who mead makers say is most likely to buy mead

Gender

59% Males
41% Females

Age

54% 35-44 years old
34% 25-34 years old
12% 45-54 years old

Competition

43% Beer
35% Wine

Who's buying other alcohol categories

RTDs

60% Female
62% 25-40 years old

Seltzers

53% Female
30% 25-34 years old

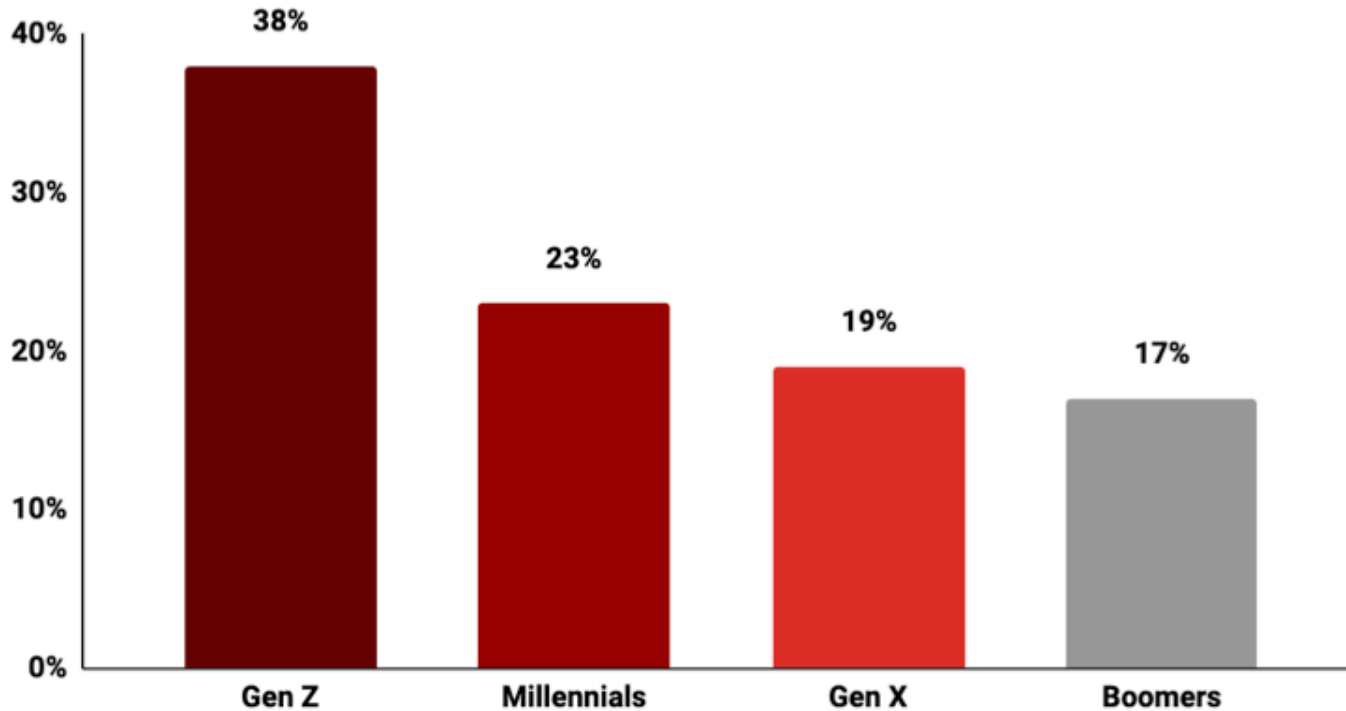
Craft Beer

Mainly males between the ages of 21-44

Wine

59% females
and skews old, but

Generational Preferences: Who Anticipates Buying More Red Wine in 2022 Compared to 2021



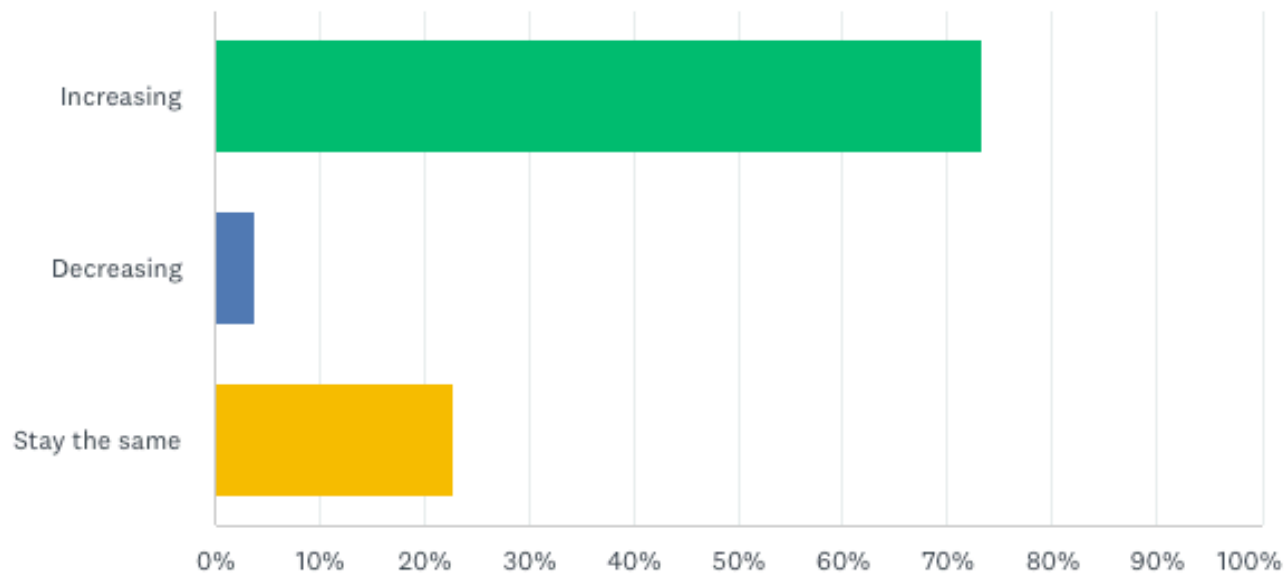
WHAT'S IT ALL MEAN?

1. Meaderies should focus their marketing efforts on young female drinkers who consume based on “feels.”
2. Women are driving emerging category consumption. To make mead the “next big thing,” the gateway is through female drinkers.
3. Significant opportunity to for the very youngest wine drinkers to embrace mead and make it their “own”



Do you plan on increasing or decreasing your honey usage next year?

Answered: 105 Skipped: 0



THANK YOU!
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