

WSWA Access Distribution Playbook

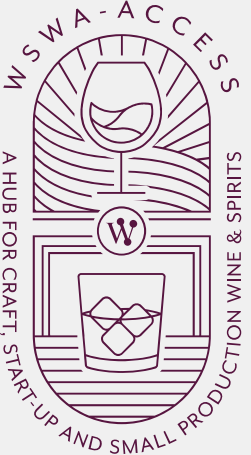
December 9, 2021



2021

WSWA ACCESS DISTRIBUTION PLAYBOOK

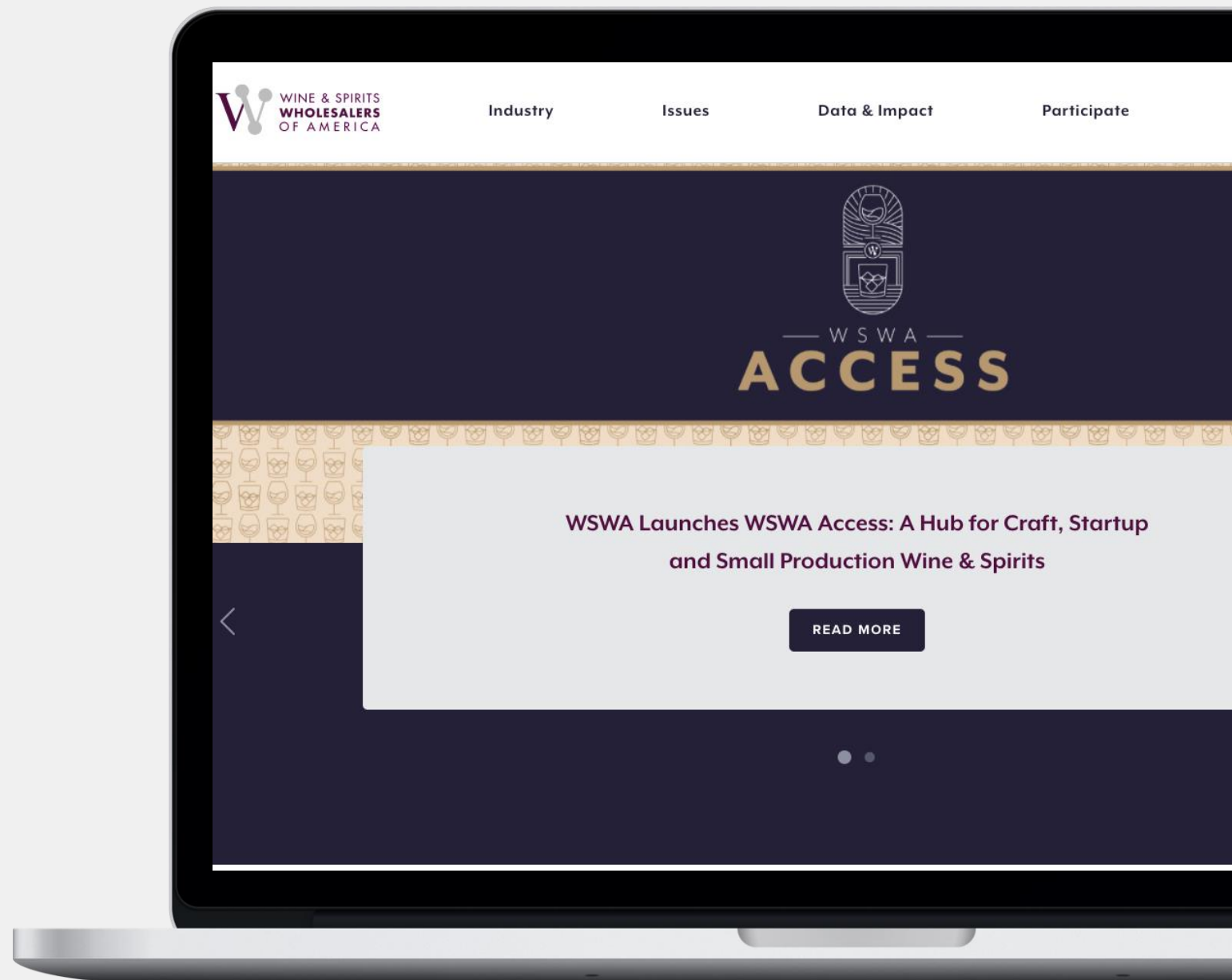




WSWA Access

A Hub for Craft, Startup and Small Production Wine & Spirits

WSWA Access is on a mission to develop and work closely with craft, start-up and small production wine & spirits brands by providing expert guidance, resources and best practices that help labels navigate industry challenges and identify opportunities in an effort to further enhance a smartly regulated and successful U.S. alcohol marketplace.





How to Use the WSWA Access Distribution Playbook

- ✓ How to Use the WSWA Access Distribution Playbook
- ✓ The Value of Working With a Wholesaler Partner
- ✓ Who Is the WSWA Access Advisory Council?
- ✓ What To Do Before You Bottle
- ✓ How To Develop a Business Plan
- ✓ Making Your Juice Scalable
- ✓ How to Go Digital Successfully
- ✓ How To Pitch Your Brand
- ✓ How To Close the Deal

Don't miss the industry's first craft wine and spirits distribution playbook, with **FREE** digital copies available to all who register and attend.

Get the scoop from successful craft brand owners and operators on best practices and tips that are leading to impressive growth both on- and off-premise. **Leading craft brand distributors will give competitive insight on getting into the most competitive marketplace in the world, as well as what it takes to run a business in the current climate.**

Meet Our Wholesaler Advisors!



Cheryl Durzy
Liberation Distributing, INC



Rick Lopus
Great Lakes Wine & Spirits



Drew Levinson
Breakthru Beverage Group



Sara Harmelin
Allied Beverage Group, LLC



Michael Klauer
Momentum Beverage Team - IL



Ken Rosenberg
Republic National Distributing
Company



Ray Lombard
Southern Glazer's Wine &
Spirits, LLC

Meet Our Brand Representatives!



Kat Hantas
21 Seeds Tequila



Phillip Rawleigh
291 Colorado Whiskey



Scott Neil
American Freedom
Distillery



Patrick Jean-Baptiste
Crafthouse Cocktails



Bob Gunter
Koloa Rum Company



Mimi Buttenheim
Mad River Distillers



Subir Singh
Mico Spirits



Alexei Khimenko
MyStory Wine Company



Susan Lambert
Remington Family Distillers



John Bilello
Sweet Amber Distilling



Atlas Cheek
Treaty Oak Distilling


Craft Spirits

A few numbers



- **2,290** active craft distillers (Aug 2021); **+1.1%** vs year ago, and almost **2x** 2015

SIZE (2020)

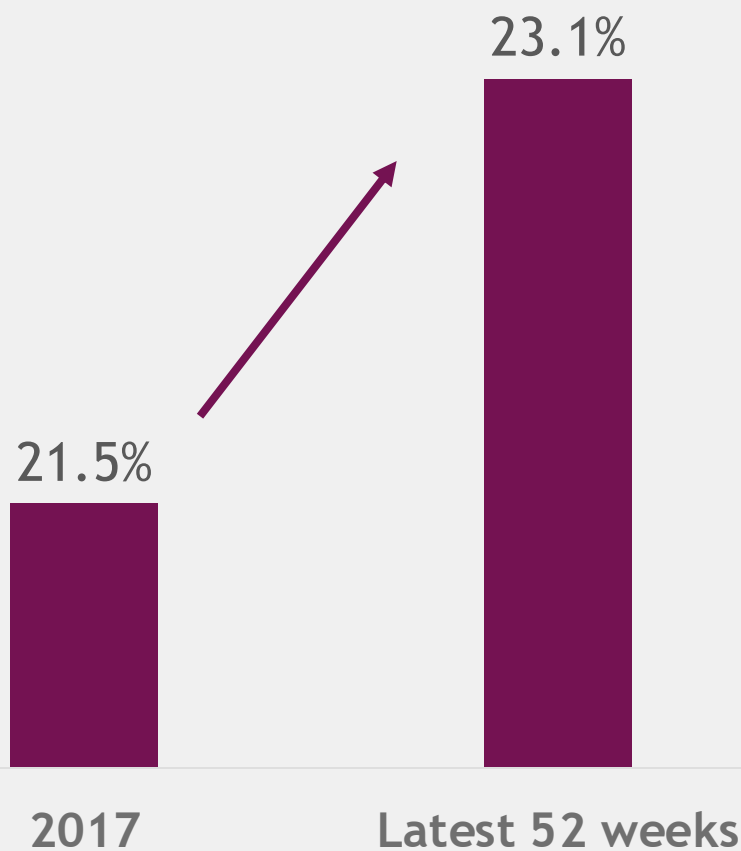
- **12m** 9L cases in retail sales; **+7.3%** vs YAG (ahead of +5% volume gain for Spirits overall in 2020)  SipSource By WSWA
- **\$6.7** billion in sales; **+9.8%** vs YAG

SHARE (2020)

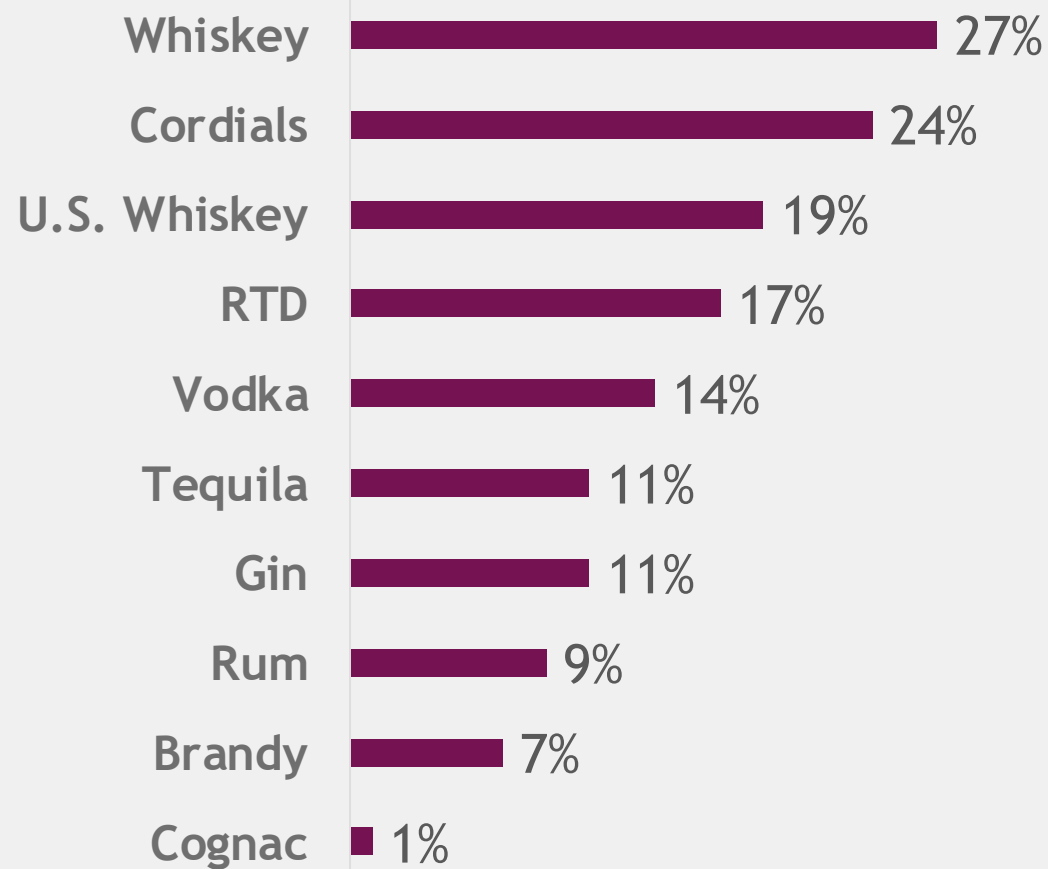
- **4.7%** (volume) and **7.1%** (value); up from 2.2% (volume)/3% (value) in 2015

There is still significant room for ‘craft’ brands beyond top brands

Share of NON Top 100 Spirit brands
(Dollars)



Share of NON Top 25 Brands - by segment
(Dollars)

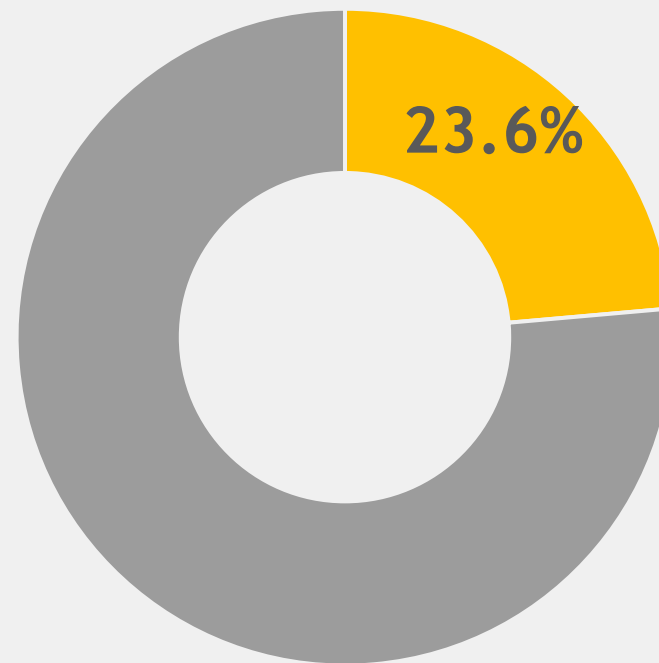
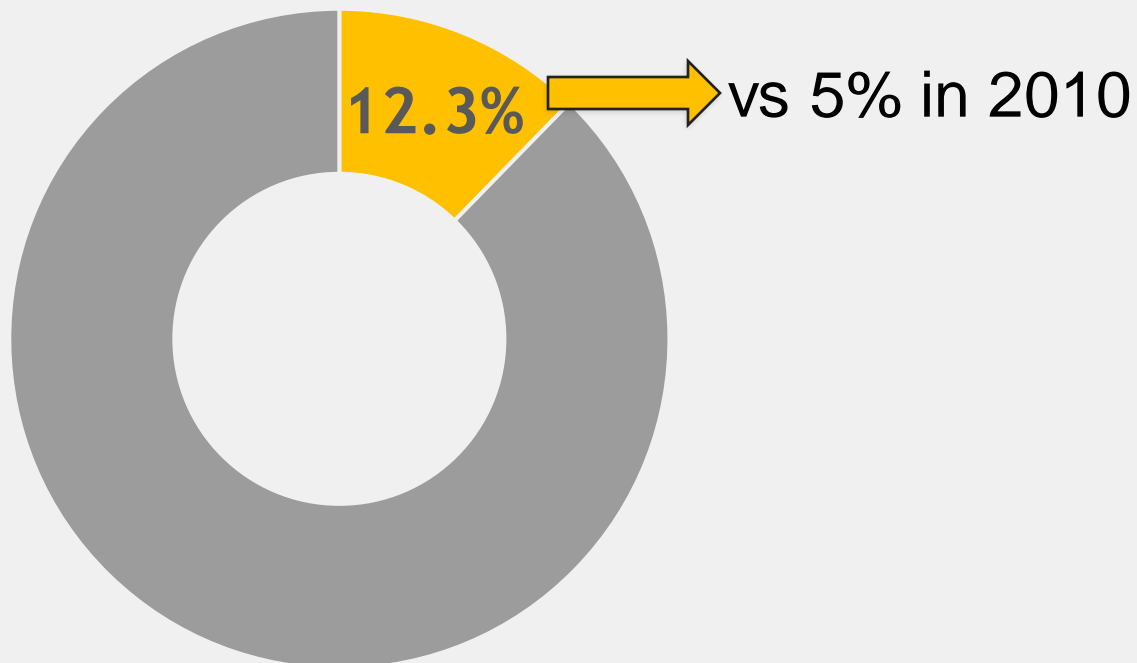


A comparison to the robust Craft Beer industry

2020 Sales Share (Volume)

2020 Sales Share (Dollars)

Craft Beer share



Broad Consumer Drivers



Experience



Authenticity; exploration/discovery; entertainment

Flavor(s)



Flavor seekers - traditional + new/different

Convenience



Online shopping

Right pack type/size

Wellness - for 'me' & 'we'



Healthier/social moderation; sustainability/CSR

Transparency



Desire to know exactly what they're consuming

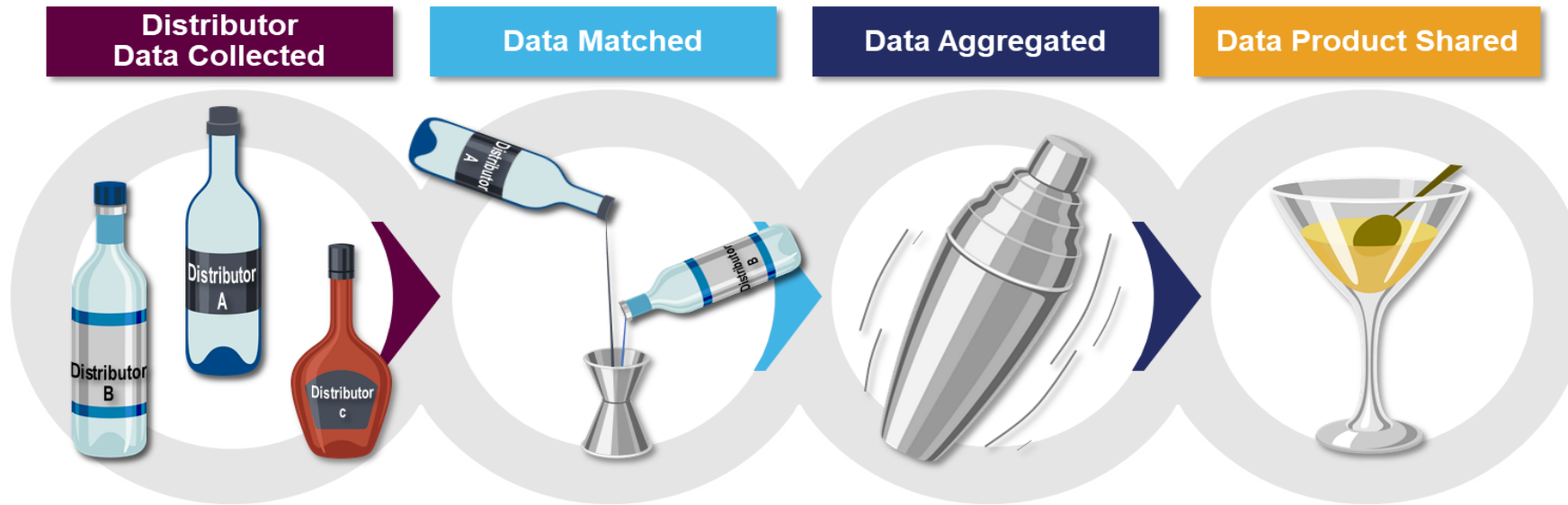
Premiumization



Drinking better; not necessarily more



What is SipSource?



Source Data

Distributors send data to VIP. Each company's data rests in separate, confidential data warehouses.

VIP

Each distributor's products are mapped to VIP's Item Catalog and outlet master.

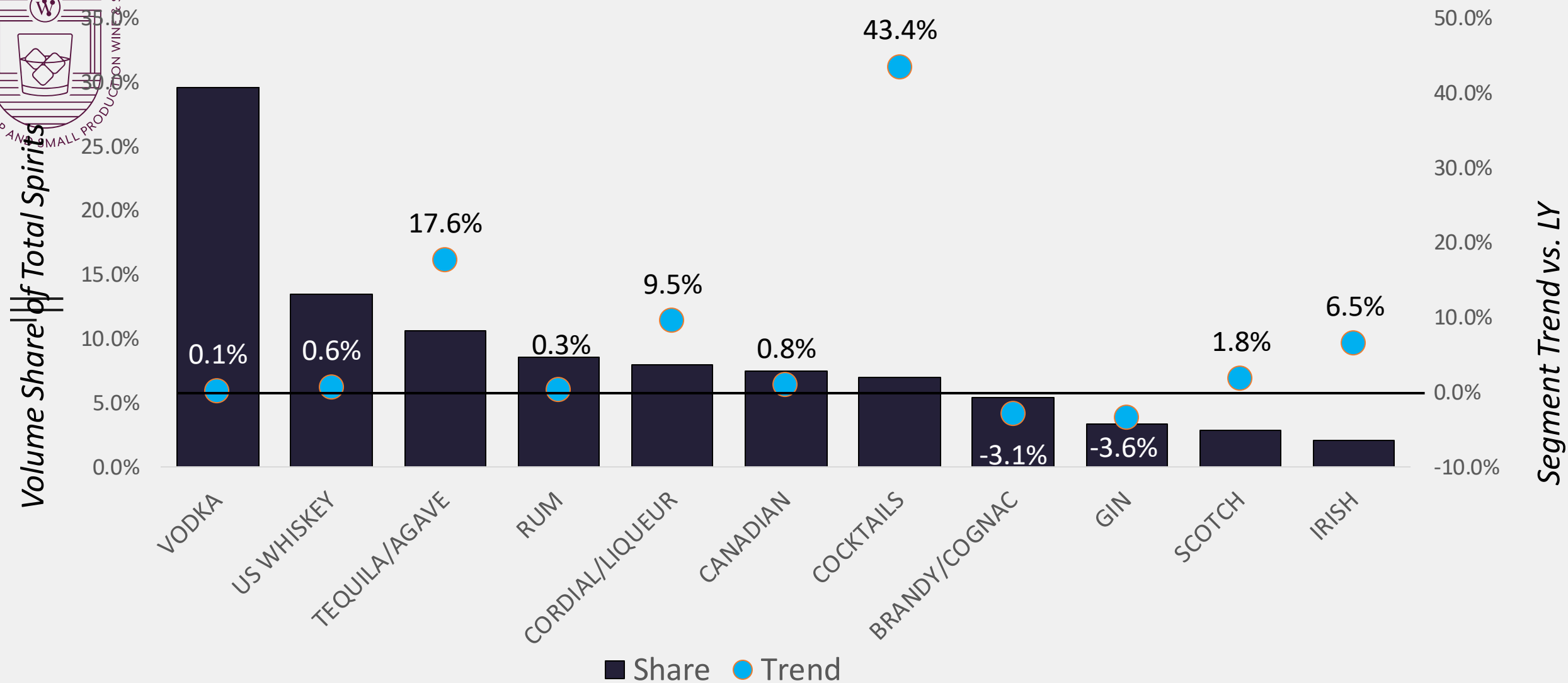
Data is then aggregated and aligned to standard groups (e.g., product classes, trade channel).

SipSource iDIG

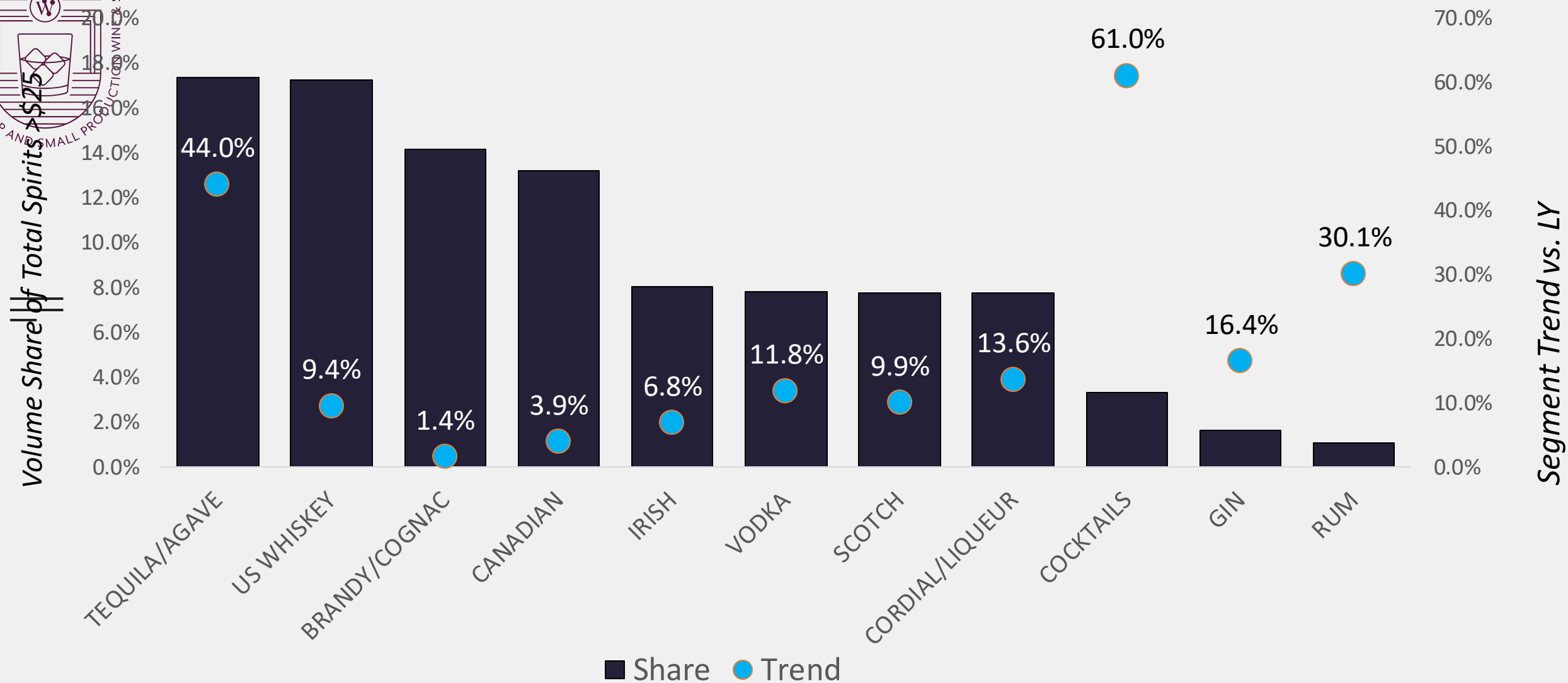
Aggregated data is published in VIP's iDIG platform for business insights.



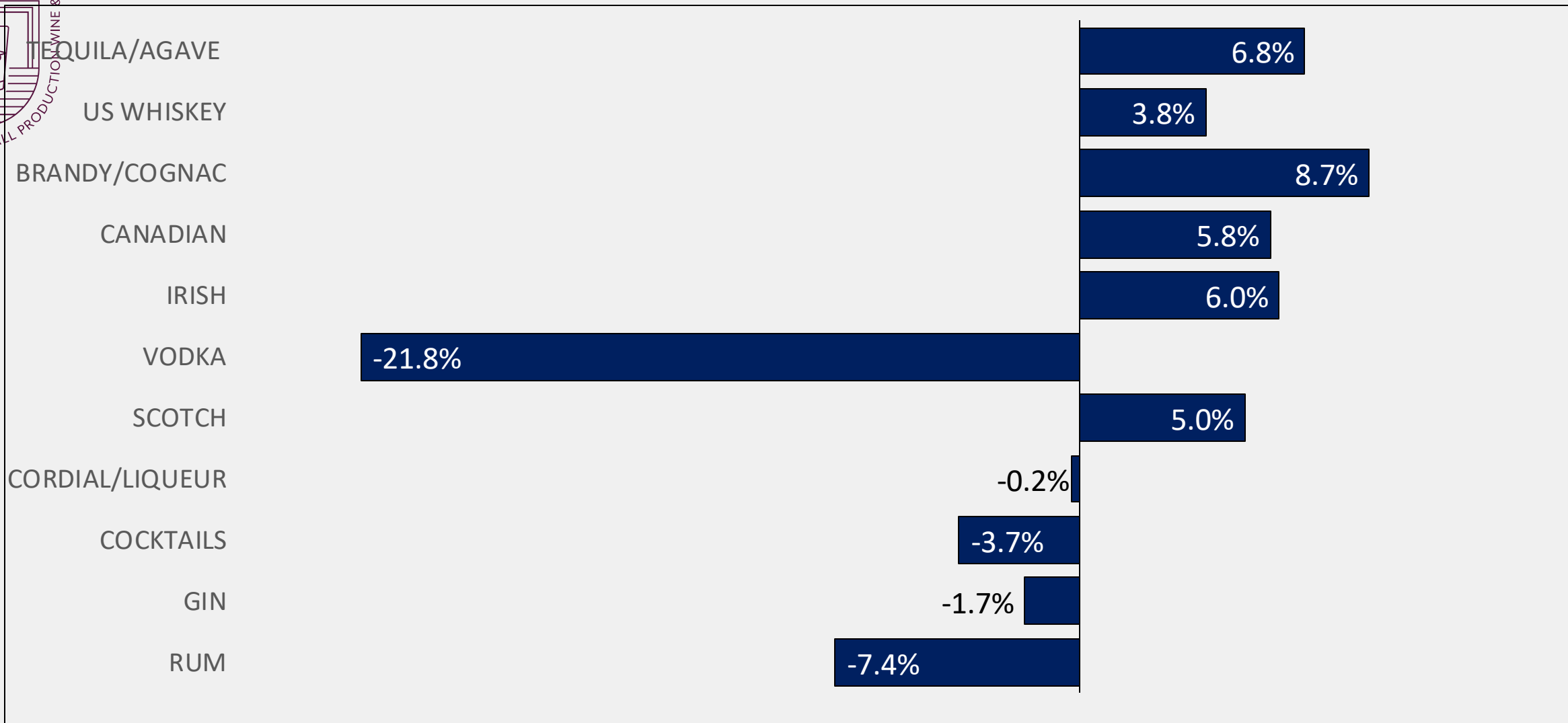
Leading Spirits Classes



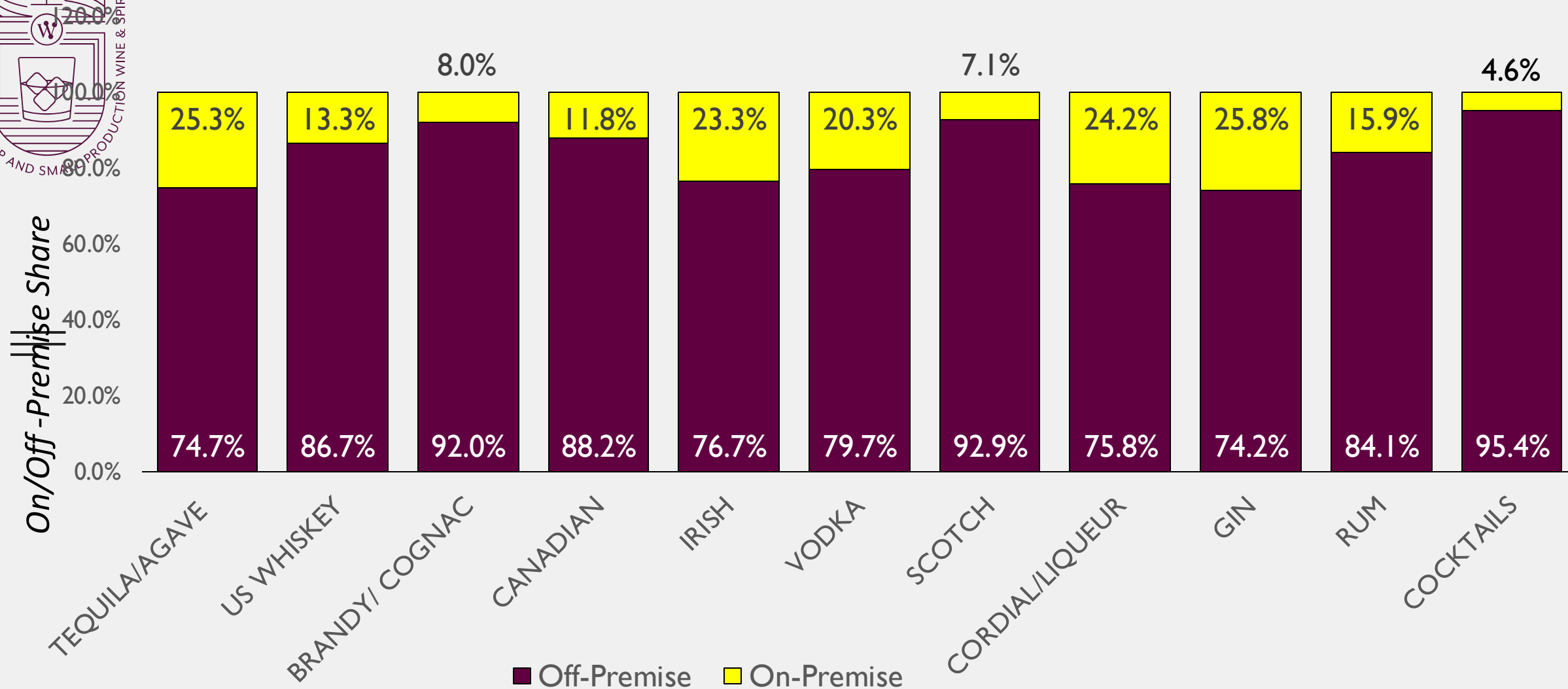
Very different story for products over \$25.00



Share Gap: Over \$25.00 to Total Spirits



Knowing where to play is important





WHO IS YOUR CUSTOMER?

The work you did in developing your brand becomes crucial here. You should be able to provide the defining characteristics of your anticipated customer base.



Behavioral:

The purchasing power, engagement level, likelihood to try new things, brand loyalty, and level of engagement with the brands they prefer.

Psychographic:

The personality and lifestyle elements that your likely customer might share, including interests, opinions, political views, values, and beliefs.

Geographic:

The markets — and even neighborhoods — where your typical customer lives, works, and (above all) buys. Obviously, you'll want to make sure that people with your preferred demographic profile are well represented in your target rollout markets.

Demographic:

The age range, gender percentages, education and income levels, race or ethnicity, and household makeup of your typical customer.

Going Digital

One of the first things you'll need to do as you launch your brand is create your website. If you've already secured an appropriate domain name (YourBeverageBrand.com) and hosting services, you're ready to build a site. Most companies will hire this out, though it's certainly possible to do it yourself.

Spend some time scrutinizing the websites of your favorite brands — large and small, startup and established, alcohol or not — paying careful attention to how the brand story forms the core of the messaging. Again, remember your target consumer and remember to appeal to your audience. Whatever your story might be, present it in language and imagery that will ring true with your target consumer. Imagine you are talking to your ideal customer and then tailor the words and sentences directly to them.

At the very least, you'll want a home page that introduces your brand, an "About Us" page that tells your story in greater detail, a page for each item in your product family and a "Contact Us" page that lets others get in touch. In accordance with industry standards, you'll need to have an age affirmation mechanism to grant of-age visitors access to the site while blocking underage visitors.

As you establish local accounts, you'll want to create a distribution map or list that shows visitors where they can purchase your product. This is especially important for emerging brands. For example, if someone tries out your wine or spirit at a restaurant, bar, or nightclub and then wants to pick up a full bottle to enjoy at home, you'll want to facilitate that. Plus, it helps both your on-premise and off-premise accounts when you drive traffic to their sites.

Another useful page is one that allows consumers to opt in to messages from you. Depending on your brand and target customer, you may want to use email, text messages, or both to keep people informed about events, partnerships, product launches, and other company news.

Don't forget to link your website to your social media platforms, and vice-versa.



"When I first met Kat [of craft tequila startup 21 Seeds] and saw her product, I went on the website, I knew who they were in one minute, and the juice happened to be great — that was a bonus!"

Sara Harmelin

VP of Digital Innovation,
Allied Beverage Group

For more information about best practices for building your website and promoting your brand, here are some good resources:

- **DISCUS:** Responsible Practices for Beverage Alcohol Advertising
- **Wine Institute:** Code of Advertising Standards

Online Advertising

There has never been a better time to bring a product to market than today. In the past, traditional media such as newspapers and magazines, television, radio, and out-of-home (billboards) were often so expensive, they served as a barrier to entry for up-and-coming brands. They also provided almost no mechanism for tracking their effectiveness, so companies never really knew what was driving sales.

With the advent of online advertising, though, you have virtually unlimited opportunities to reach customers on their phones, their computers, and their mobile devices. And you can literally follow them wherever they go.

Search Marketing

Also known as pay-per-click (or PPC), search marketing allows you to target specific terms on search engines. When someone searches for a particular word or phrase, an ad appears. The best part: you only pay if the person actually clicks on the ad. Costs are based on the popularity of the search phrases you're bidding on, and you can spend anywhere from a few dollars to millions per day, based on your budget.

Display Advertising

Sometimes known as banner ads, online display advertising is usually sold on a per-impression basis. Each time a banner is displayed, that counts as an impression. Online display is best used as an awareness generator. Another popular application is in retargeting. With retargeting, a user who has visited your website or clicked on its content can be tracked and retargeted with banner ads on other sites, reinforcing your brand message to someone who has already engaged.

Social Media Marketing

A large portion of your customers spend hours each day on various social media platforms. Besides engaging users through your organic posts and content, you can also pay the platform to push messages — both to those who have “liked” you and to those who haven’t. Since these platforms have lots of personal information about their users (including the most important one: their age), social media marketing can be very effective. Different platforms have different offerings. Be sure to set up your social media with business accounts, as promotion opportunities may differ from those available to personal and community pages.

Content Marketing

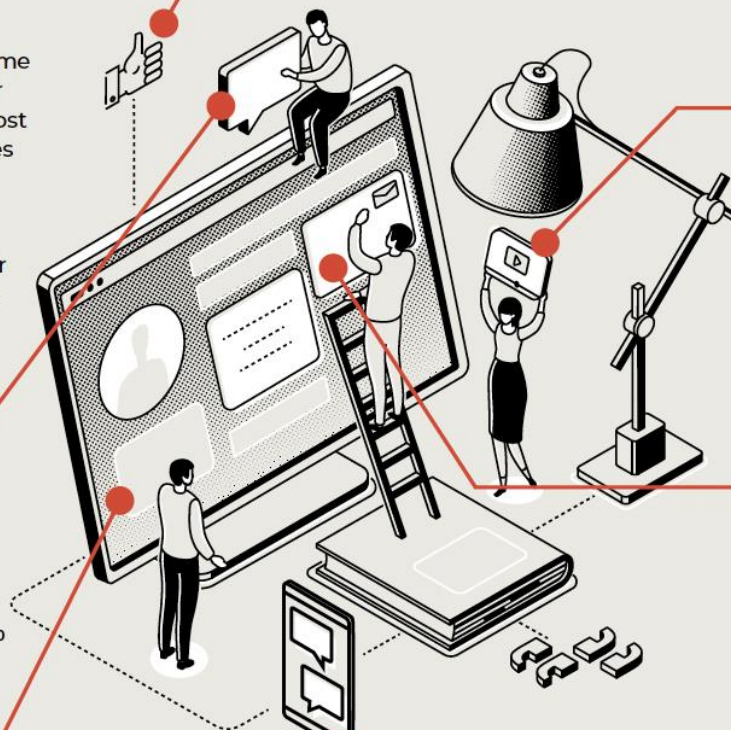
Maybe it’s an article on a popular website, or a segment on a podcast or online video, or it might be a post on your own website. Any time you create written, audio or video content that informs or entertains your audience while also promoting your brand and its products, you’re doing content marketing. Hand in hand with content is search engine optimization (SEO), which is the art and science of making your content “bubble up” in the results of a targeted web search.

Email Marketing

Though it’s now considered a little “old school,” email marketing is still effective for certain audiences. Whether it’s sending out product messages to your own list, or piggybacking on the emails of a partner, email puts you right in your customer’s in-box. Decision-based campaigns, which send cadenced messages with follow-ups based on recipients’ actions (like reading/not reading, clicking/not clicking) allow you to get very granular in your email marketing activities.

Mobile Marketing

Permission-based text messaging can also be impactful as a marketing tool, which is why you’ll want to capture mobile numbers as part of your customer data information. Mobile is especially effective with younger consumers, though you have to be careful about not sending out too many texts.



WHO IS YOUR Leader?

You may already have your executive team in place, or you may create placeholder positions to fill as you gain investors and your company grows.

According to Access Team member Ray Lombard of Southern Glazer's Wine & Spirits, most craft wine and spirits companies will need four key leaders:

"The brands that I've found that have had the most success are the ones that have cross-functional leaders or founders, where you have a CFO who has a strong financial background, [you] usually have a distiller or brand owner who's very creative. And do you also have somebody who brings that industry expertise — you know, as to how to navigate the state's title, navigate the distributor network and so forth? And that same person, many times, could also function as your production and supply chain lead. And having ... that fourth person, which is your supply chain lead, that's important too."

Your business plan should highlight four "pillar" members of your executive team:

1. **President/Chief Executive Officer:** Brand owner and/or head distiller who manages the creative direction for your company.
2. **Chief Financial Officer:** Senior executive responsible for managing your company's finances, including attracting investment.
3. **Sales Officer:** Takes the lead in acquiring accounts, entering new markets, meeting revenue targets.
4. **Supply Chain Manager:** Responsible for handling your overall supply chain, operations, and logistics.

As your company grows, you'll obviously need some additional leadership positions in various areas. It's helpful to show where you're heading in terms of staffing. Since you'll likely go into your initial market(s) without a big distributor doing the heavy lifting, you'll need to think about how you'll handle sales and distribution until you ink a deal with a wholesaler.



John Bilello

CEO,
Sweet Amber Distilling



Boots on the ground

"Will you have boots on the ground? This is critically important, and your distributor has a huge book and they're taking a chance on a new brand — particularly if it's coming from an unknown supplier. So, will you have boots on the ground in market, or is it more regional in nature?"





Liquid to Lips

"In addition to doing your market research at launch or prior to launch, you hear a lot of people saying, 'Look, you need to be really strong in your backyard before you look elsewhere.'"

John Bilello

CEO,
Sweet Amber Distilling

Going Local

As you begin bottling your product, you need to begin getting it into the hands of customers. Since you don't have a deal with a wholesaler yet, what that means is going out into your local market and selling local accounts. It also might mean opening an onsite tasting room or holding tasting events at local bars and restaurants.

First of all, whatever you do, make absolutely certain that you comply with state and local regulations governing craft wine and spirits. Running afoul of the authorities is a great way to end your career as a producer before it's even begun.

Second, you'll need to get creative with your efforts to get out the word — and the product — to potential consumers. In the on-premise, you can sponsor happy hours, with drink specials that feature your product and special menus that tell your brand story. You can negotiate to get your wine on the wine menu in a restaurant that's a good fit for your brand image. Be ready and willing to train the wait staff and

bartenders and give them opportunities to taste the product.

In the off-premise, you might focus on smaller, independent retailers who are more likely to be able to make direct purchasing decisions. Make an appointment and be considerate of their time. If you can provide point-of-sale materials at this point, even better.

"If you can't win in your backyard, if you can't win amongst your friends and your neighbors, it's going to be challenging."

Rick Lopus

VP Sales Development,
Great Lakes Wine & Spirits

While these are all great ways to promote your brand, some activities in the on- and off-premise may not be allowed in certain areas. Whatever you do, make absolutely sure that you're in compliance with state and local regulations governing distribution and marketing of craft wine and spirits. WSWA's State Law Database is a great resource to figure out the dos and don'ts of your market.



Once you have a foothold, you can promote your on-premise and off-premise accounts across social media, driving traffic to your partners and creating additional buzz.

And by the way ... each time you talk to a bar proprietor, a restaurateur, a night club owner, or a retailer, you're practicing for the pitch you'll eventually give to the wholesaler that will take your product to the next level.

Kate Latts

Chief Marketing Officer,
Heaven Hill Brands



The importance of on-premise

"Consumers do not want to just hibernate in their house all the time. They invite every single thing they can from their phone. But to get them to go into a store or into a bar or an event or whatever, it has to be an experience. It has to be fun, right? So ... part of that evolution is us working with our distributor partners and working with retailers to figure out how we, as suppliers, can bring that fun experience vis-a-vis point of sale into the retail space — into the on-premise account ... whether it be education or just really aisle-violating amazing display type things. ... A person is a kind of point of sale, doing tastings. So, all of those things, I think, are as critically important than ever before, maybe even more so because the importance of giving someone that experience to close the sale, because the vast majority of sales are still happening in the retail store, not online. We cannot think we can walk away from it."





Making the Juice

We can't tell you how to produce your product, so we're not going to try. As you move into production, though, you'll obviously need to ensure that you comply with all federal, state, and local requirements relating to producing your product. This includes obtaining the correct licenses and permits, obeying food and beverage regulations, carrying the required insurance and complying with employment and tax laws.

Beyond just creating a product, there are some other important considerations.



"Does it taste good? Do I want to spend that price point on a bottle I don't know if it's good or not?"

Jimmy Sharp

Head Distiller,
John Emerald Distilling



Delivering Quality

As Access member Luis Gonzalez of Old Elk Distillery, puts it, "If you taste the product and it doesn't pass the taste test, it's a conversation that might be over pretty quick."

Of course, taste is often a matter of... well, taste.

Obviously, with some products, you'll know right away what it's going to taste like. With others, it's a waiting game. Either way, smart makers will get outside opinions on how their product stacks up against the competition because you're not vinting or distilling in a vacuum.

It's critical to gauge how your product's taste compares to the other products it will be alongside — whether on a back bar, on a wine list, or on a retail shelf. As Richard Hanauer, RPM Restaurant Group's Wine Director, says, "The best wine will win. And I think that a lot of people are so excited about making a product, and they feel so successful because they've bottled wine or tequila or whatever the fad is this year, and they don't stop to taste wines at a very similar price point and actually understand where they are in their value."

Hitting the Price Point

Taste is one aspect of quality. The other controlling factor is price.

"It's not just about taste, by the way," says Rick Lopus, V.P. of Sales Development for Great Lakes Wine & Spirits. "There are different price points, so you know, the level of quality can vary, based on what your marketing niche is going to be. And we factor all that in when we taste them."

As in any business, price is always a huge consideration. Overhead. Labor. Cost of goods. These are all things that you and your investors will be keeping a close eye on as you begin production.

This is where your market research should help guide you. If you know what products you're going head-to-head with, you'll know what price point you have to hit to be competitive (assuming the taste is there). When you first start producing product, you may not be as efficient as you'll eventually need to be. It will be up to your entire production team to find the right way to produce, package and distribute your product at a price point that makes sense.



Luis Gonzalez

CEO,
Old Elk Distillery



Vanity vs. Sanity

"But I think that once you get past that point, it's really about the product, and a lot of people say, 'Well, I want to have a \$70 product.' And are you positioned well for that \$70 product? And back to that, vanity and sanity? Sell-in of a \$70 product is vanity and sell-through of a \$70 product is sanity. And so, it's really trying to understand what is their strategy, where are their gaps, from either a product positioning, a product category, or a product price point."



Scalability

When we talk about quality and price, we also have to talk about scalability. If you're a craft distillery or a small-production winery and you want to stay that way, you probably won't need a distributor because your goal is likely to stay small and local. On the other hand, if your goal is nationwide distribution and near-universal brand recognition, you'll need to think ahead three, five, or even ten years and consider how you'll increase production as your product catches on.

For example, if you're packaging your "juice" in hand-blown artisanal bottles, it's one thing to order those by the dozen, and another thing entirely to need 100,000 or more per month.

According to Michael Bender of Ole Smokey Distillery, scalability is "the ability to grow, to expand across the United States, to engage with more consumers, but doing it in a very planned way in a partnership with our wholesale network, and doing it in a way that doesn't jeopardize product quality or customer service." As you begin producing product, you'll need to keep the big picture in mind because potential wholesalers will want to know what your plans are to ramp up operations.

Jeff Kozak

CEO,
Whistlepig Whiskey



Scalable by design

"Think about scalability or even automation. If you design a label or a product and then you realize you can't scale it to whatever your eventual case goals are, then you should just stop and pause. So again, if you're trying to be a small micro-brand, then you can go as crazy as you want. If you eventually want to be commercially viable, then you've got to think twice about how does that packaging fit together and can it be automated?"





wswa.org/access

Don't miss your chance to
download a **FREE** copy of
the industry's first
Distribution Playbook!





Introduction



Note From the Access Team

In January of 2021, the wholesaler advisors and brand representatives of the WSWA Access Advisory Council set out to create the wine and spirits industry's first ever Distribution Playbook.



The team learned during initial discovery meetings that craft, startup and small production wine and spirits brands were asking for a template to follow when pitching their products to wine and spirits wholesalers. In addition, Access wholesaler advisors – craft brand development experts – were frustrated by inconsistencies in the new product pitches presented to them by these emerging companies. By helping producers craft their brand messages more carefully, we enable distributors to make better-informed decisions, increase the quality of both product and product information that gets to retailers (both on- and off-premise) and further increase the diversity of products available to consumers through licensed retailers.

Before You Bottle

Doing Your Homework

Before you launch your brand, experts recommend you conduct your own market research to learn more about where your brand would, could, and should be positioned. Before you bottle a new product, you should be able to answer three key questions: Who is your consumer? Where are your customers? Where do you fit into your target category?

The more brainstorming you do about your target customer, the easier it will be to craft your messaging to them. Once you understand who your consumer is, other key brand elements fall into place: target markets, brand proposition, marketing, and building brand loyalty. Access Team member Ray Lombard, of Southern Glazer's Wine & Spirits, recommends going deeper and asking yourself:

- What's the value proposition that you have to your consumer?
- When your customer drinks this brand, they feel like "X."
- What does drinking your brand say about your consumer?

Kat Hantas

CEO,
21 Seeds



Who is your consumer? Why it matters

For 21 Seeds Founder Kat Hantas and her team, knowing who her customer is drives the entire brand and business model — everything from marketing efforts, on- vs. off-premise strategy, and finding the right wholesaler partner centered on their customer.

"Our girl doesn't really like sitting at a bar learning about a cocktail, really. She's ordering her drink, she's hanging out with her girlfriends, or she's a mom and she's drinking at home. So, for us [we had to ask], 'Where does she go for discovery?' She goes online for discovery. She goes to Instagram, she goes to Twitter, she goes to Facebook. We're going to reach her there — it's called the 'outer premise' and that's really where we're building our brand."



"Your brand has to have the 'it' factor," Lombard says, "and there has to be passion behind it. ... How people have a personal bond or a personal connection with a brand, and time and time again, that's how great brands are built. That's how you have people who will drive a General Motors car their entire life or have been drinking Patron for the last 20-plus years from Crown Royal, multi-generational and so forth. It's because how people identify with the brands or what's the 'it' value — that's very important."

Drew Levinson, another Access Team member, adds, "Any brand that's coming to market, especially in this day and age, really has to have a clear reason for being in existence in that space."

So that's the trick... coming up with your reason to exist.

Levinson elaborates:

"Having that point of differentiation, knowing exactly who you are as a brand and what's your story and how that story is going to resonate, and being able to convey that not just to us as the wholesaler, but through to the consumer. So often we get kind of put in the position that we have to be the face of the brand, and we can do that to some extent, but ultimately the brand — its face, its story, its ethos — has to come through to the consumer, so that the consumer wants to go and actually pull that brand off the shelf or the bartender wants to put that brand into their cocktail. And so often, when we are talking to brands, we're trying to understand what is that whole opportunity, what is going to differentiate them?"

— Drew Levinson,
VP of Business Development,
Breakthru Beverage



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Building Your Distribution Playbook: From Pitch to Deal

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BUILDING YOUR DISTRIBUTION PLAYBOOK
FROM PITCH TO DEAL

THURSDAY, APRIL 08, 2021

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So that's the trick... coming up with your reason to exist.

Levinson elaborates:

"Having that point of differentiation, knowing exactly who you are as a brand and what's your story and how that story is going to resonate, and being able to convey that not just to us as the wholesaler, but through to the consumer. So often we get kind of put in the position that we have to be the face of the brand, and we can do that to some extent, but ultimately the brand — its face, its story, its ethos — has to come through to the consumer, so that the consumer wants to go and actually pull that brand off the shelf or the bartender wants to put that brand into their cocktail. And so often, when we are talking to brands, we're trying to understand what is that whole opportunity, what is going to differentiate them?"

— Drew Levinson,
VP of Business Development,
Breakthru Beverage



THANK YOU!

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