



Brand Audit + Recommendations

Amherst Brewing +
The Hangar

10/4/17

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Overview

The goal of this presentation is both diagnostic and exploratory. Our process involved rigorously collecting and assessing strengths and weaknesses in both the Craft Beer industry and its relationship to dining, and their position in the regional marketplace. The intended outcome is to discover already present opportunities and leverage existing strengths to produce new growth. In this process we have gained a tremendous insight into

the world of the Hangar and Amherst Brewing from the brand to the product to the consumer.

The end result of this presentation is primarily focused on strategy. We hope to help build a clear direction for the brands and outlets going forward that will be the foundation for a successful business strategy, brand structure and outbound media presence to promote growth.

Introduction

What we cover in this phase >

**Marketplace + Competition
Exploration**

What We See + Hear

Brand Strategy Considerations

Marketplace

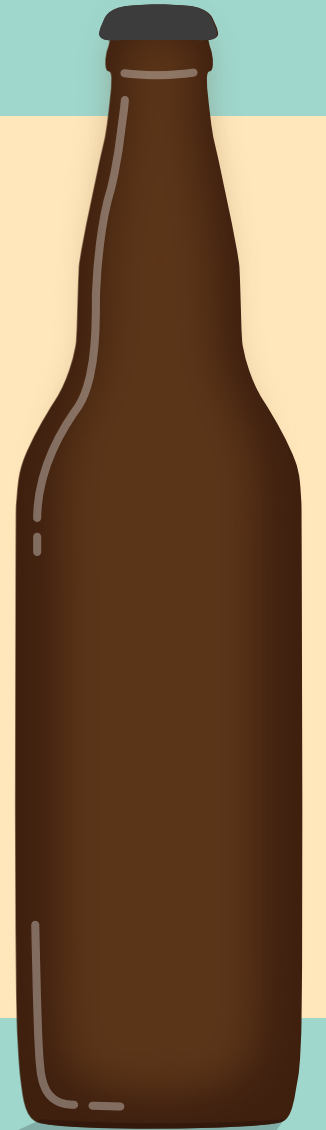
In this section, we share some of our research on the Craft Beer industry and beer's relationship to dining. These highlights reveal some things we already know as well as some new ideas that may be beneficial from both a branding and business strategy perspective.

For us, research is not a driving force in our collective creative decision-making, but rather a compass to assure us that we are moving in the proper direction both visually and strategically.

Market Trends Craft Brew Terms

“SMALL” APPEARS AS A KEY ASSOCIATION WITH CRAFT BEER

Consumers do not appear to be familiar with the industry definition of craft beer. Instead, they may be using identifiers such as small, local, limited, unique, and flavor to make their own determination. Response suggests that large breweries are doing well with passing products off as craft brews. In order to preserve participation, the craft industry may consider stronger promotion of the official parameters. At the same time, non-craft brands can focus on some of the key identifiers in order to gain favor among craft drinkers.



Market Trends
Craft Brew Terms

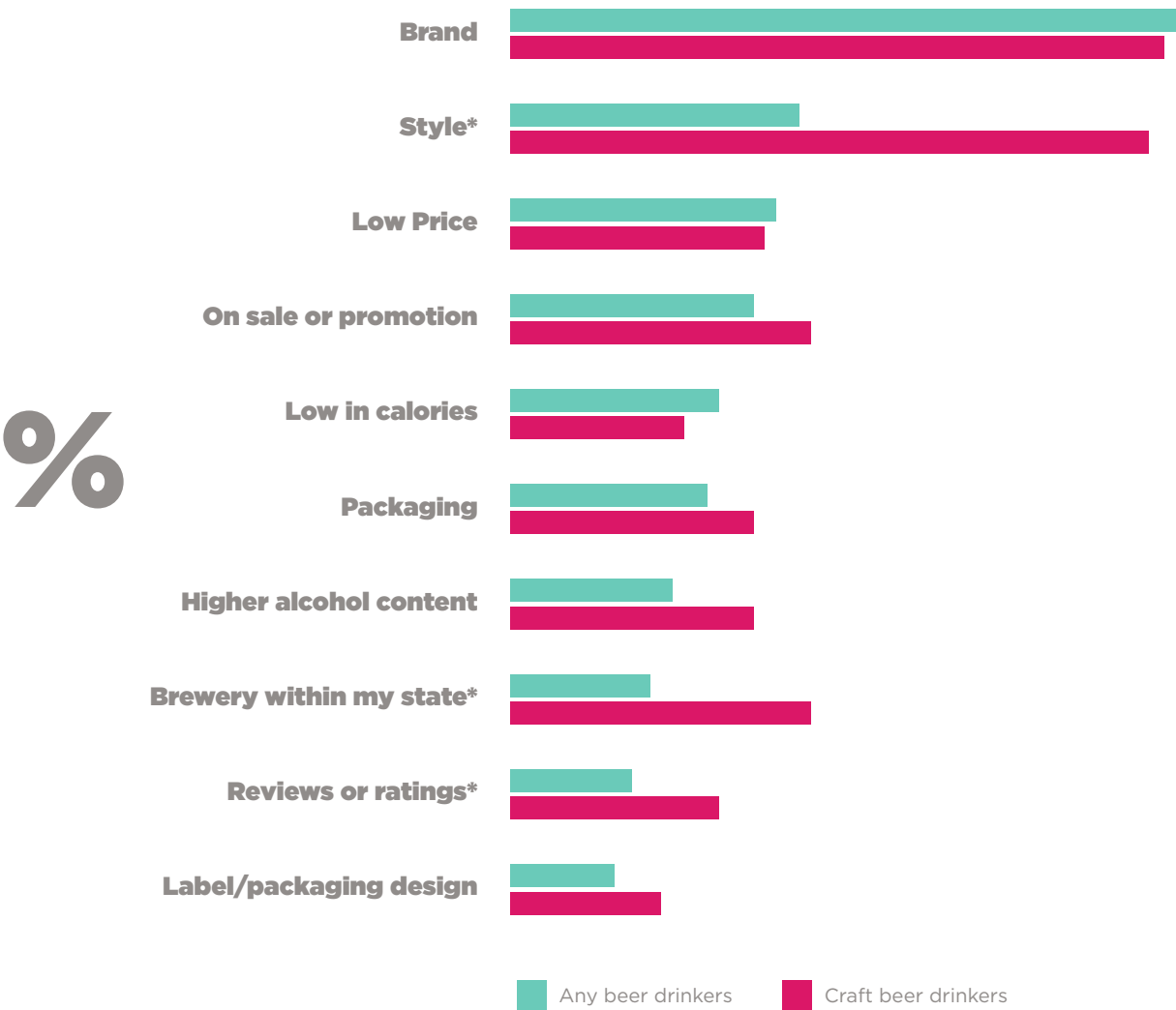
“List the first five words or short phrases that come to mind when you think of craft beer.”



Base: 11 adults aged 22+ *generated from open-end responses. Font size corresponds with frequency of word or phrase among responses
Source: Lightspeed GMI/Mintel

Market Trends
Craft Brew
Factors in Purchase

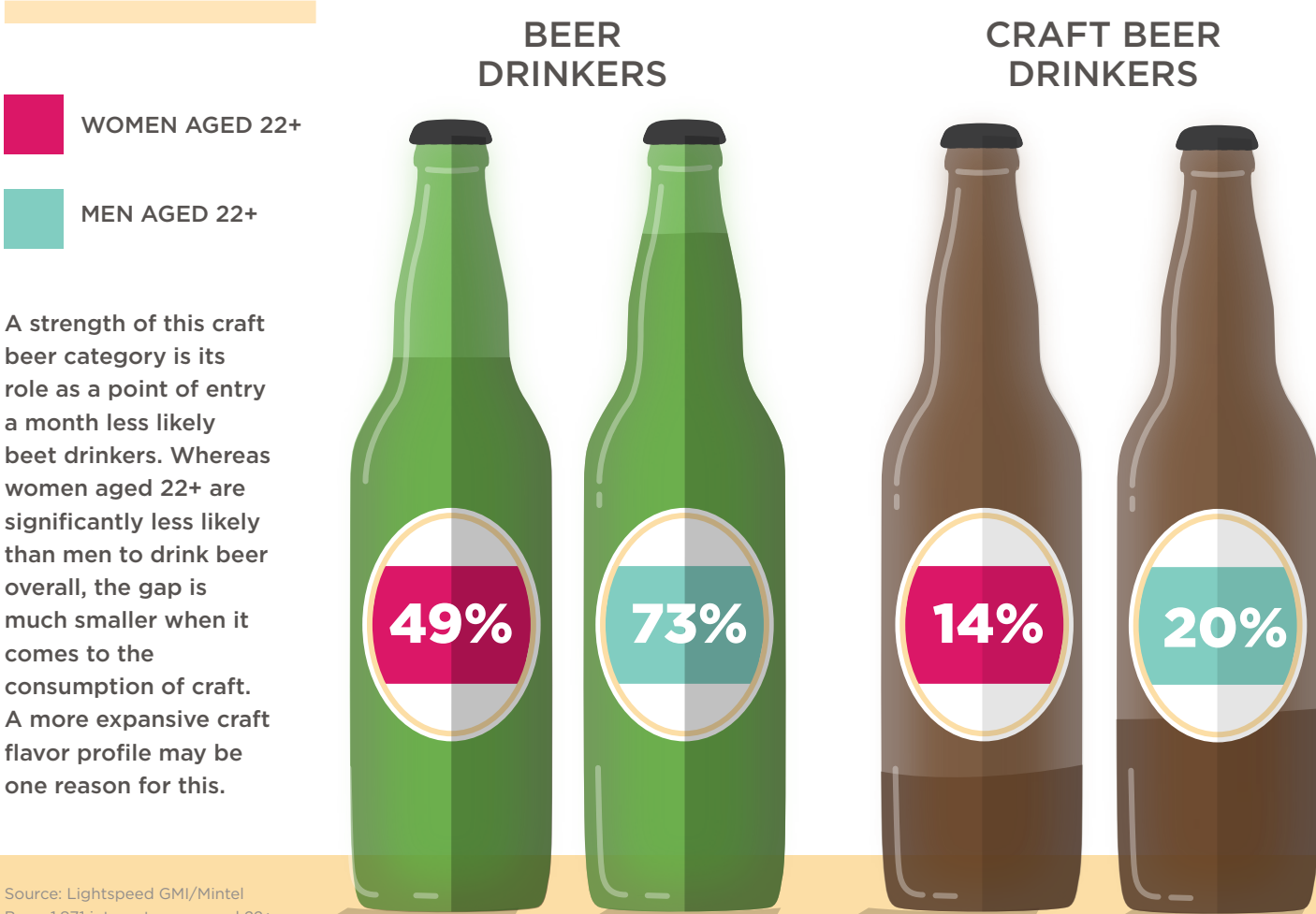
SELECT FACTORS INFLUENCING BEER PURCHASE*,
BY CRAFT BEER CONSUMPTION, JULY 2015



Base: 1,139 internet users aged 22+ who drink beer
Source: Lightspeed GMI/Mintel

Market Trends
Craft Brew
Gender

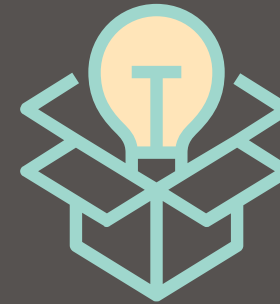
CRAFT BEER GENDER
GAP IS SMALLER THAN
THAT OF BEER OVERALL



Source: Lightspeed GMI/Mintel
Base: 1,871 internet users aged 22+

Market Trends Craft Brew

WHAT WE THINK

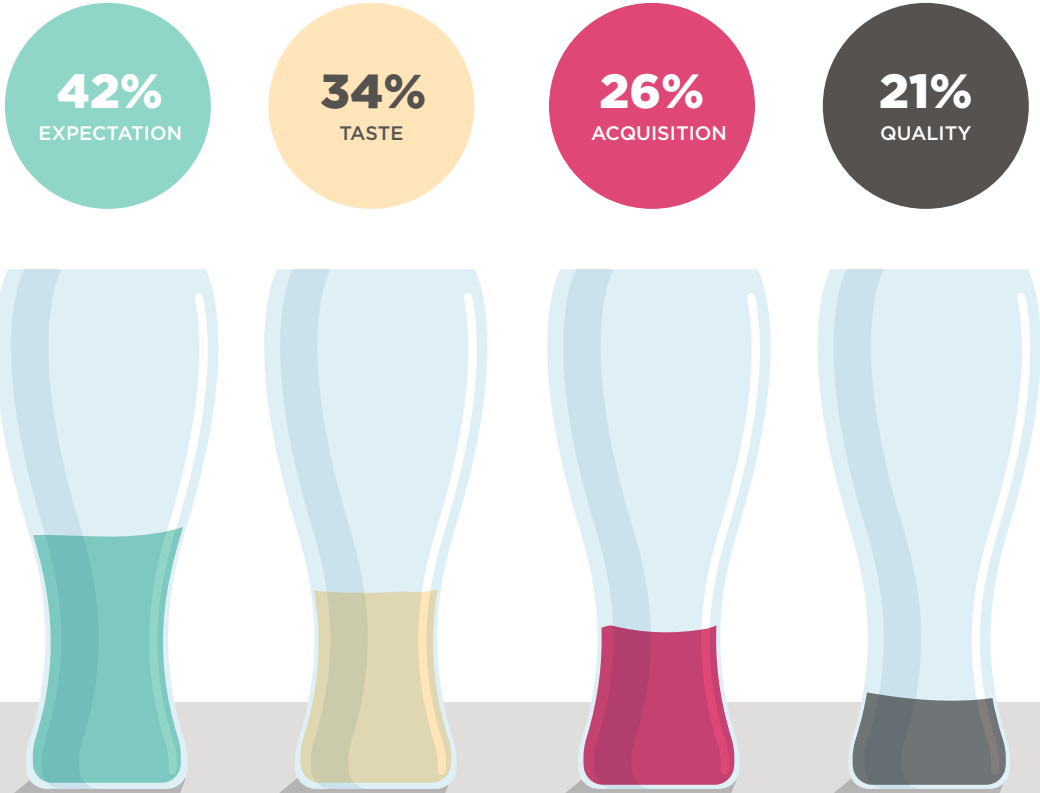


- The experience of drinking craft beer is just as, if not more, impactful than the message brands convey. Brands that can bring the spirit of craft beer and the brewing process to life will resonate best with customers.
- Brands have an opportunity to embrace the curiosity of craft beer drinkers, emphasizing an appreciation for beer education and trying many types of beers.
- Beer communities, like Untappd and Beer Advocate, are empowering engaging communities of beer enthusiasts dedicated to supporting and promoting better beer.

Market Trends
Craft Brew
On Craft Process

THE CRAFT BEER PROCESS

Leading themes, by mentions of craft beer



Conversations around craft beer show taste and quality are top of mind for consumers, and high positive sentiment conveys consumer satisfaction. Mintel Trend *The Real Thing* shows consumers are craving products and experiences that come with a stamp of authenticity. For craft beer brands this is translated in the transparency of their brewing process, and leading topics around craft beer conversations (such as brewery, brewers and brewing) convey an appreciation for it. The more mainstream something becomes the more likely we are to think of it as mass produced, less special, and less authentic; for craft beer brands the challenge lies in retaining that sense of authenticity as they grow.

Base: 4.3 million mentioned of craft beer, September 2014-2015 | Source: Infegy/Mintel

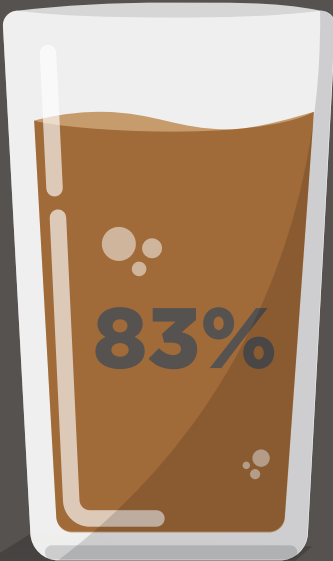
Market Trends
Craft Brew
On Process

MILLENNIAL APPRECIATION
FOR THE BREWING PROCESS

AVERAGE PASSION
SCORE



AVERAGE POSITIVE
SCORE



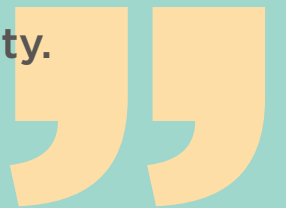
Craft breweries are opening on average at a rate of about 1.5 per day (*Brewers Associations*, December 2014), poised to further make their mark on the beer category. The influx of craft breweries has also given way to tap rooms, providing a more casual, bar-like atmosphere at the brewery. If passion scores and sentiment are any indication, consumers are extremely passionate about their brewery and tap room experiences. Mintel *Trend Sense of the Intense* tells us tastes is no longer everything, experience is. The more a consumer knows about the beer they are drinking, the richer their experience and the deeper the brand connection.

Base: 85K mentions of brewery or tap room, December 2014-2015 | Source: Infegy/Mintel

Market Trends Craft Brew Online Influence



The beer category is impacted by a growing appreciation for craft beer and interest in the brewing process. Online beer conversations show drinking beer is not just about the beer itself, but the occasion. The social elements inherent to beer, and their role in how we perceive our drinking experiences, contribute to the brand experience which in turn build greater brand affinity.

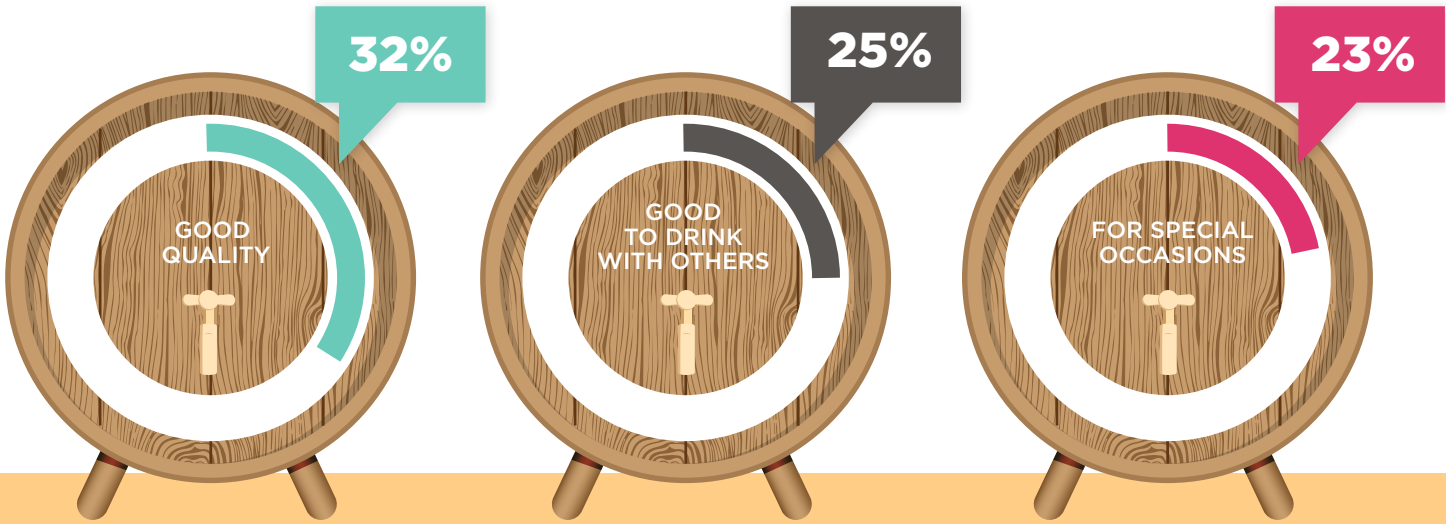


**JEANETTE ORNELAS,
SOCIAL MEDIA ANALYST**

Market Trends
Craft Brew
“True Craft”

PERCEPTIONS OF CRAFT BEER

Characteristics associated with “True Craft” beers

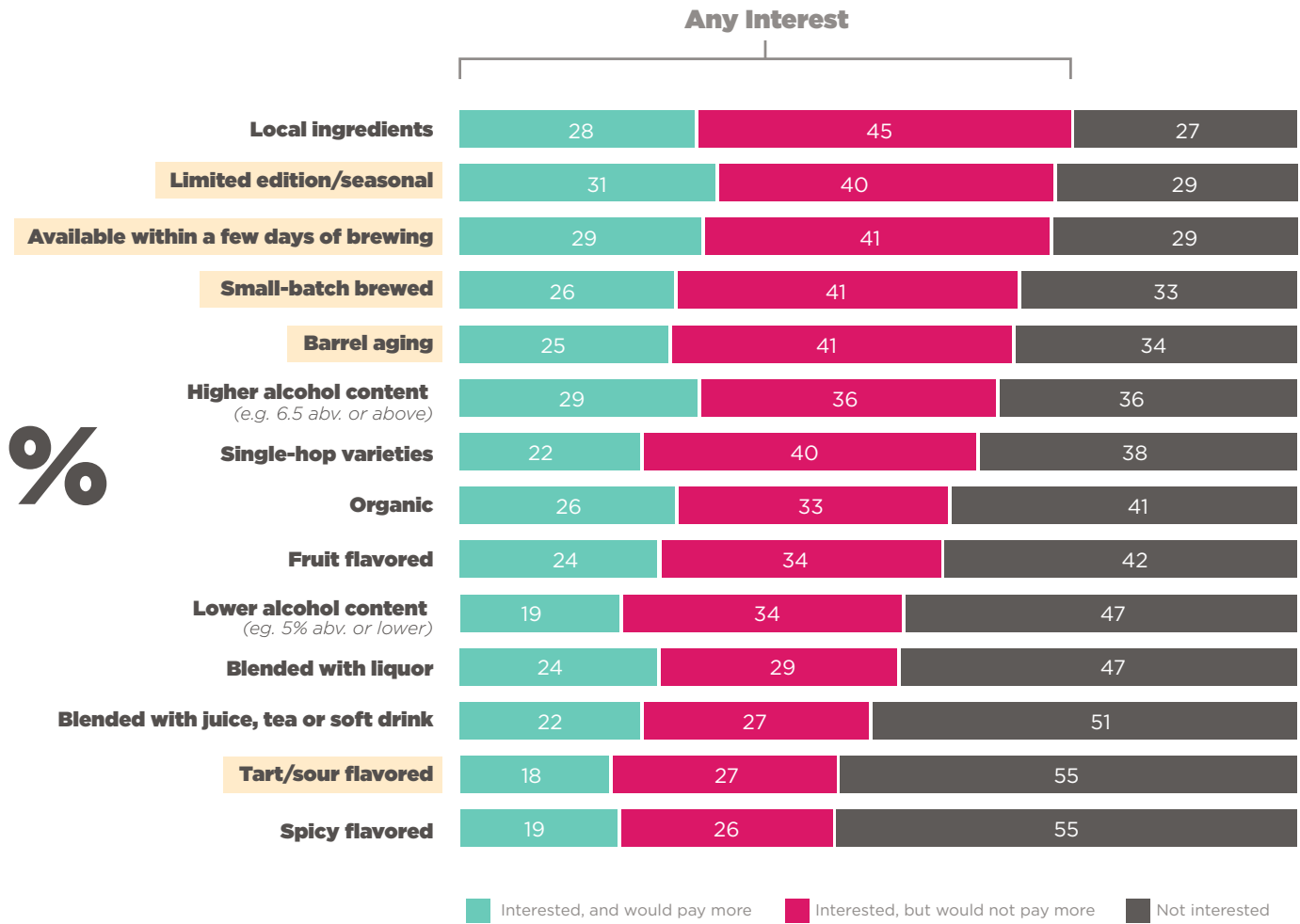


The top characteristics associated with craft beer show consumers are more likely to drink craft beer on special occasions; this can be tied to a perception of higher quality as well as lesser availability in comparison to domestic mainstream beer. Budweiser’s 2015 Super Bowl ad “Brewed the Hard Way” received backlash for its mockery of craft beer and the pretentious stereotypes associated with craft beer drinkers—in turn mocking the very people it should be embracing, Millennials. The YouTube video had over 13 million views and a 9:1 dislike to likes ratio; with many speaking to the paradox seen among big beer brands, as Budweiser recently acquired a craft brewer.

Note: “True Craft” is defined as beers from small, regional, local breweries | Base: 1,139 internet uses aged 22+ who drink beer | Source: Lightspeed GMI/Mintel

Market Trends
Craft Brew
Value In Craft

“Which of the following beer features would you be interested in and which would you be willing to pay more for?”



Base: 1,323 internet uses aged 22+ who drink alcoholic beverages
Source: Lightspeed GM/Mintel

Market Trends
Craft Brew
Craft + Cuisine

THE MILLENNIAL CRAFT BEER DRINK

Top topics, by Millennial mentions of craft beer drinking



There is a sense of self-expression that Millennial beer drinkers identify with the type of beer they drink, 29% reporting the brand of beer you drink says a lot about you (see *Statements Related to Beer* section). Millennial online conversations echo this sentiment, and further show it's not just about the beer itself but the overall atmosphere and experience. Pairing craft beer with fine cuisine is becoming a hugely popular trend in the food industry, which speaks to food coming in as a leading topic emphasizing that craft beer is meant to be experienced not just consumed.

Note: Millennial mentions only, Infegy defines Millennials as those both between 1980-2000 | Base: 10.3k mentions of craft beer and drink, September 2014-2015 | Source: Infegy/Mintel

Market Trends
Craft Brew
Instagram Trends

THE FOODIE MEETS CRAFT
BEER DRINKER ON INSTAGRAM

Leading topics among craft
beer and food instagrammers

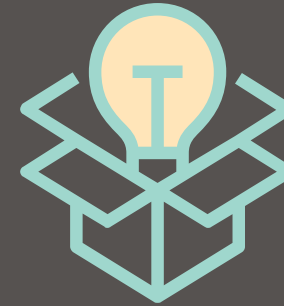


The ‘foodie’ culture is characterized by a true appreciation for food, especially as it relates to taste and quality and Millennials are shaping this, with over half of Millennials identifying as a ‘foodie’ (see *Mintel’s The Millennial Impact Food Shopping Decision —US, September 2015*). Pairing craft beer with gourmet food is becoming a popular trend in the food industry; mentions of #CraftBeer with food-related posts show the intersection of food and beer. Over half of Millennial beer drinkers drink alcoholic beverages because they like the taste, and of Millennial beer drinkers, some 67% believe beer pairs well with food (See *Motivations for Drinking* section).

Base: 4K food-related photos tagged #CraftBeer, December 8-22, 2015 | Source Chute/Mintel

Market Trends Craft Brew

WHAT WE THINK



- Brands may consider special edition beers that are made with local ingredients, inviting consumers to be a part of the selection process by voting on the name or ingredients via social media. Other brands have seen success with similar campaigns, including Ben and Jerry's state-inspired flavors and Lay's 'Do Us a Flavor' contest.
- Breweries may consider partnering with local restaurants for exclusive food and drink pairing events, leveraging the passion and knowledge of chefs and brewers while bringing together food and beer enthusiasts.
- Brands can leverage on-premise and off-premise event activations to spark connections and deeper association with their brand.
- Tapping into the growing interest brewery tours, brands can create virtual tours of their brewing facilities to better reach those who don't live in the area.

Market Trends
Dining Experience
Terms in Dining

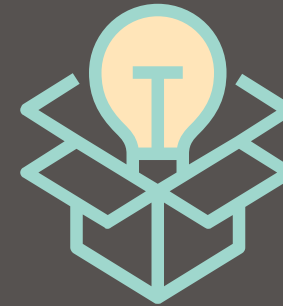
What top three words come to mind when you think of your most-visited restaurant?



Source: Deloitte proprietary survey research
Note: Above is a word cloud that shows a composite of the top three words that come to mind for each survey respondent when thinking about his or her single most-frequented restaurant within the fast service (fast casual/QSR) and casual dining space.

Market Trends Dining Experience

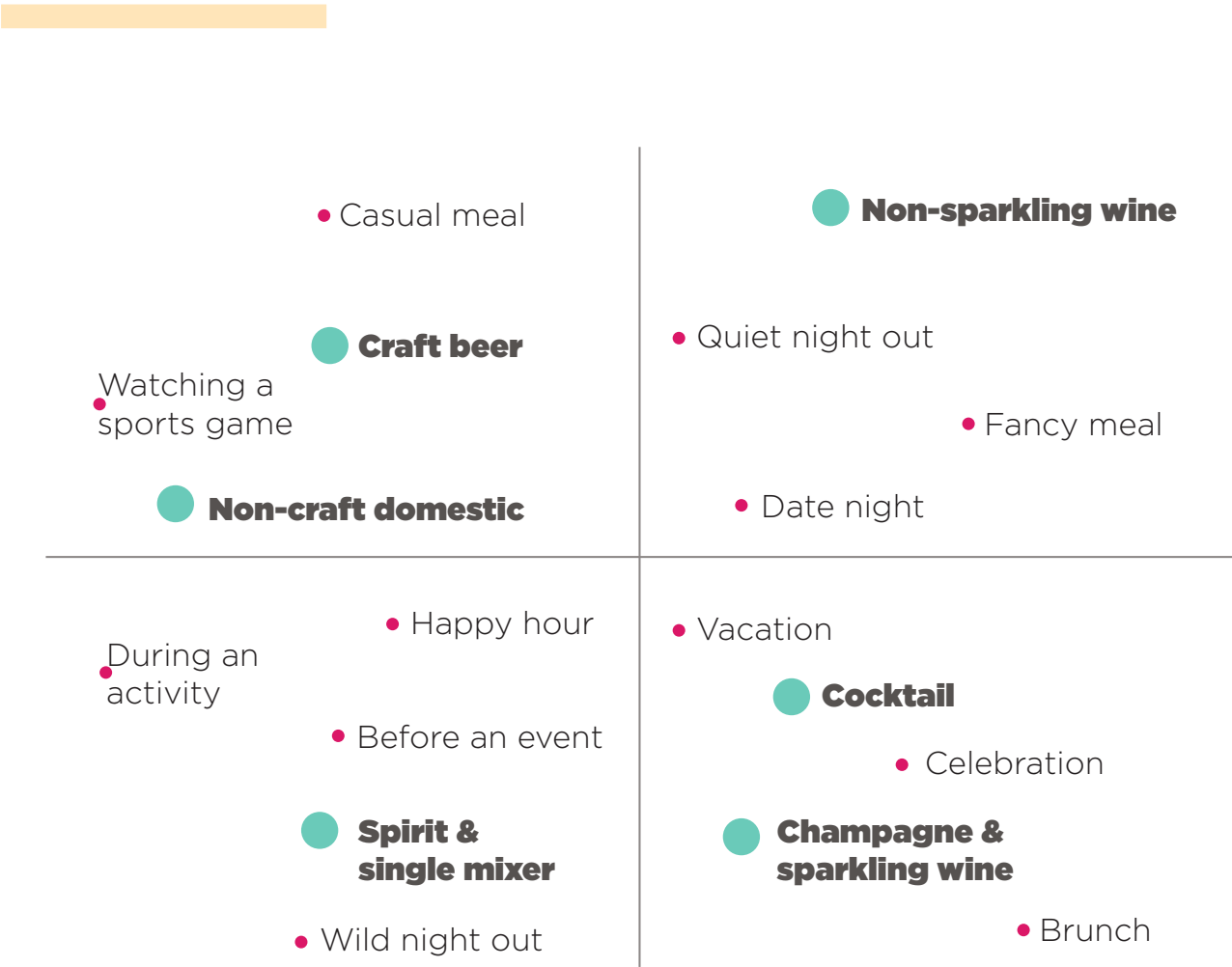
WHAT WE THINK



- Experiences are taking a more prominent role in travel planning, becoming less of an afterthought and more of the main focus for trip planners. As such, there is an opportunity in leveraging foodservice experiences as a means for discovering destinations.
- Social media engagements around dining occasions, such as brunch, show that there is a story to be told in the social motivations that drive engagement.

Market Trends
Craft + Dining
Occasions

“During which of these occasions do you drink the following drinks away from home? Please select ALL that apply per drink.”



Base: varies among drinkers | Note: Correspondence analysis illustrates which purchase drivers consumers associate with each beverage. The proximity of the occasions (blue dots) and the beverage indicates the relationship between the two variables. The closer the two variables, the stronger the association of that occasion with the beverage. If a variable is associated with more than one beverage, the positioning of the blue dot will be based on its association with each of those beverages. Source: Lightspeed/Mintel

Market Trends Craft + Dining Social Media

“

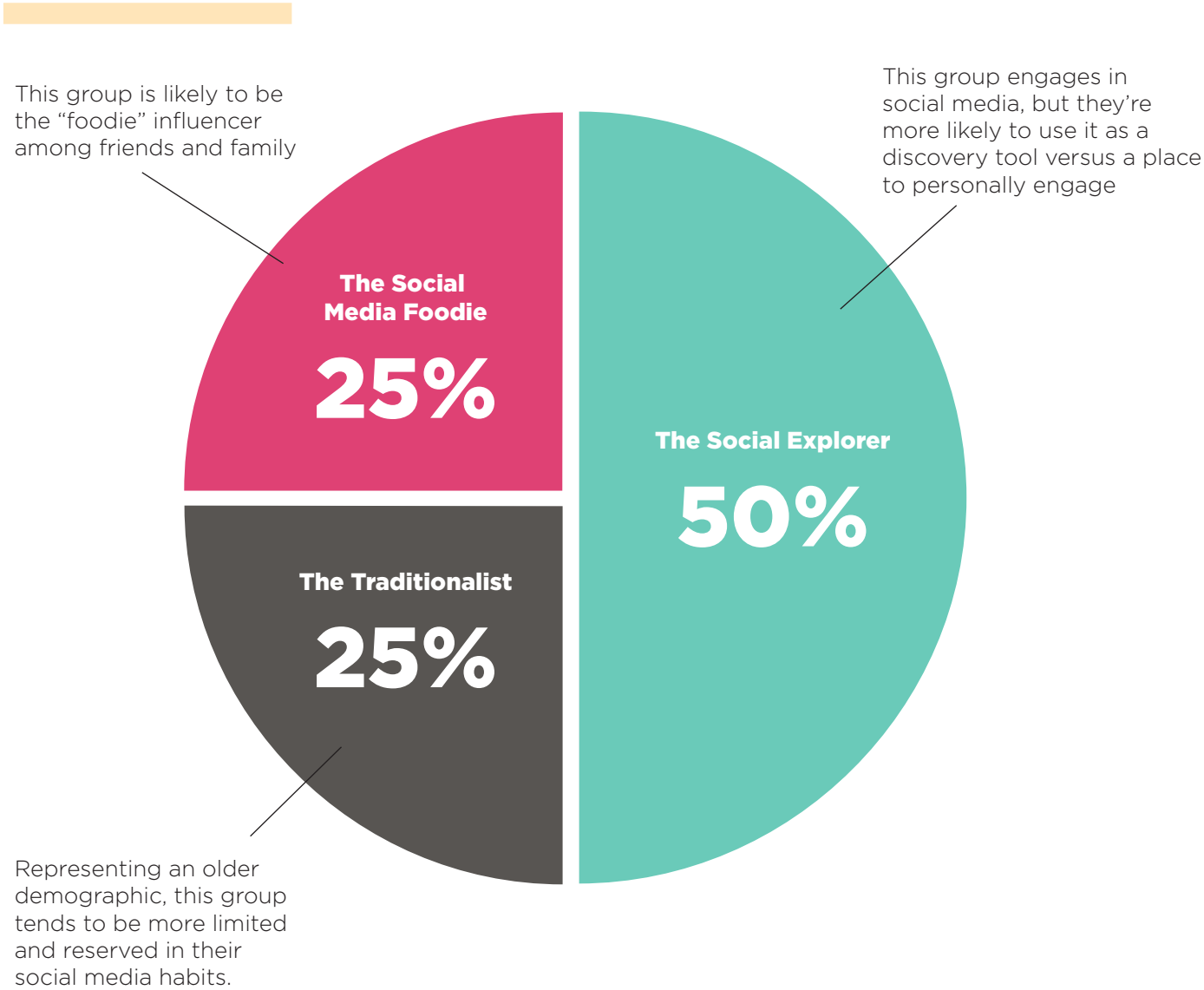
"The dining out landscape has permanently been impacted by social media from both a marketing standpoint and the actual on-premise experience. Social media has created a new focus toward the concept of being an influencer, whether on a small or large scale, and iGens and Millennials have specifically adopted social media as a part of their daily lives."

”

**DIANA KELTER,
FOODSERVICE ANALYST**

Market Trends
Craft + Dining
Social Media

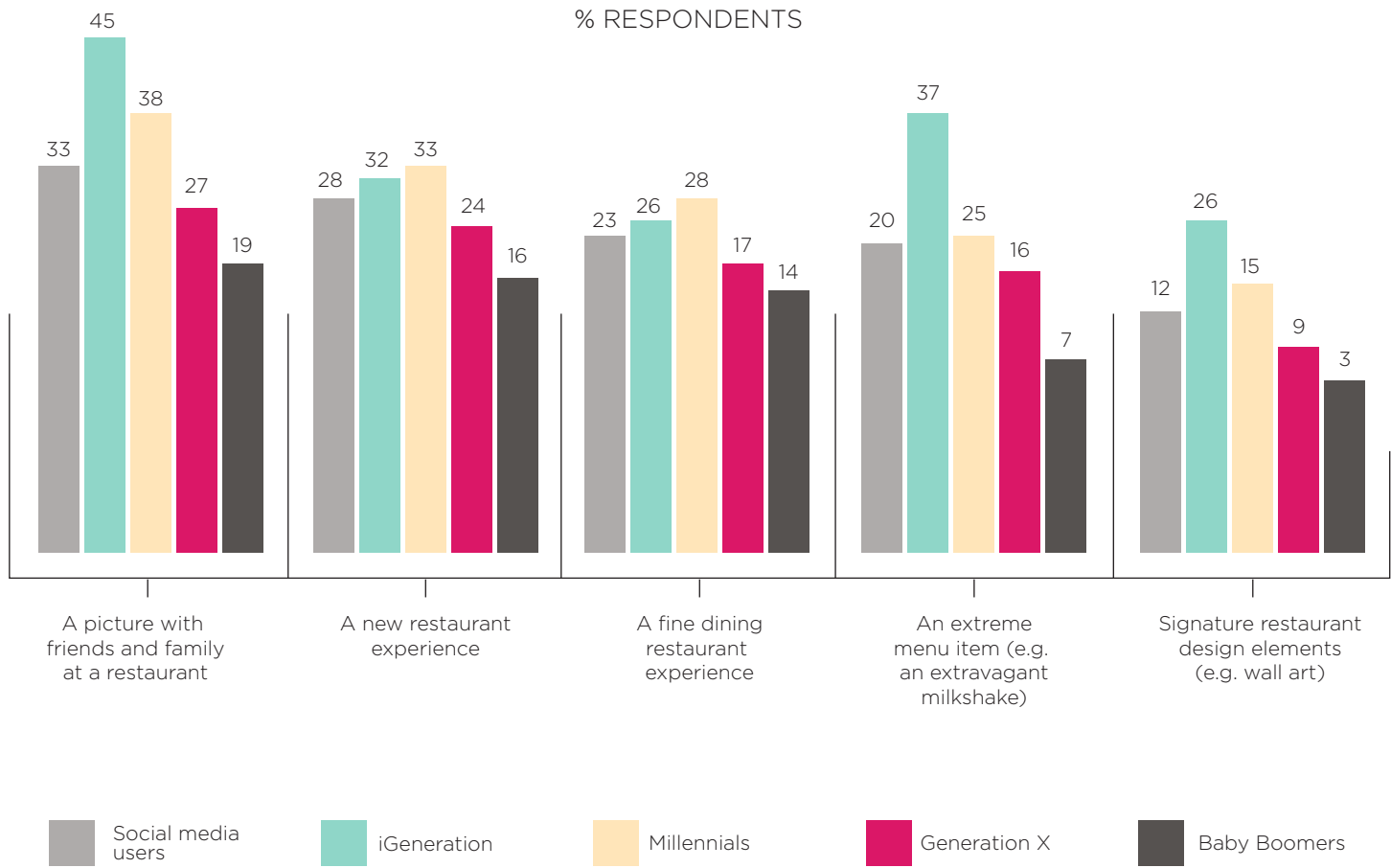
“How much do you agree or disagree with the following statements about social media? Please select one per row.”



Base: 2,000 internet users aged 18+ | Source: Lightspeed/Mintel

Market Trends
Craft + Dining
Social Media

“Which of the following restaurant experiences would you share on social media? Please select ALL that apply.”



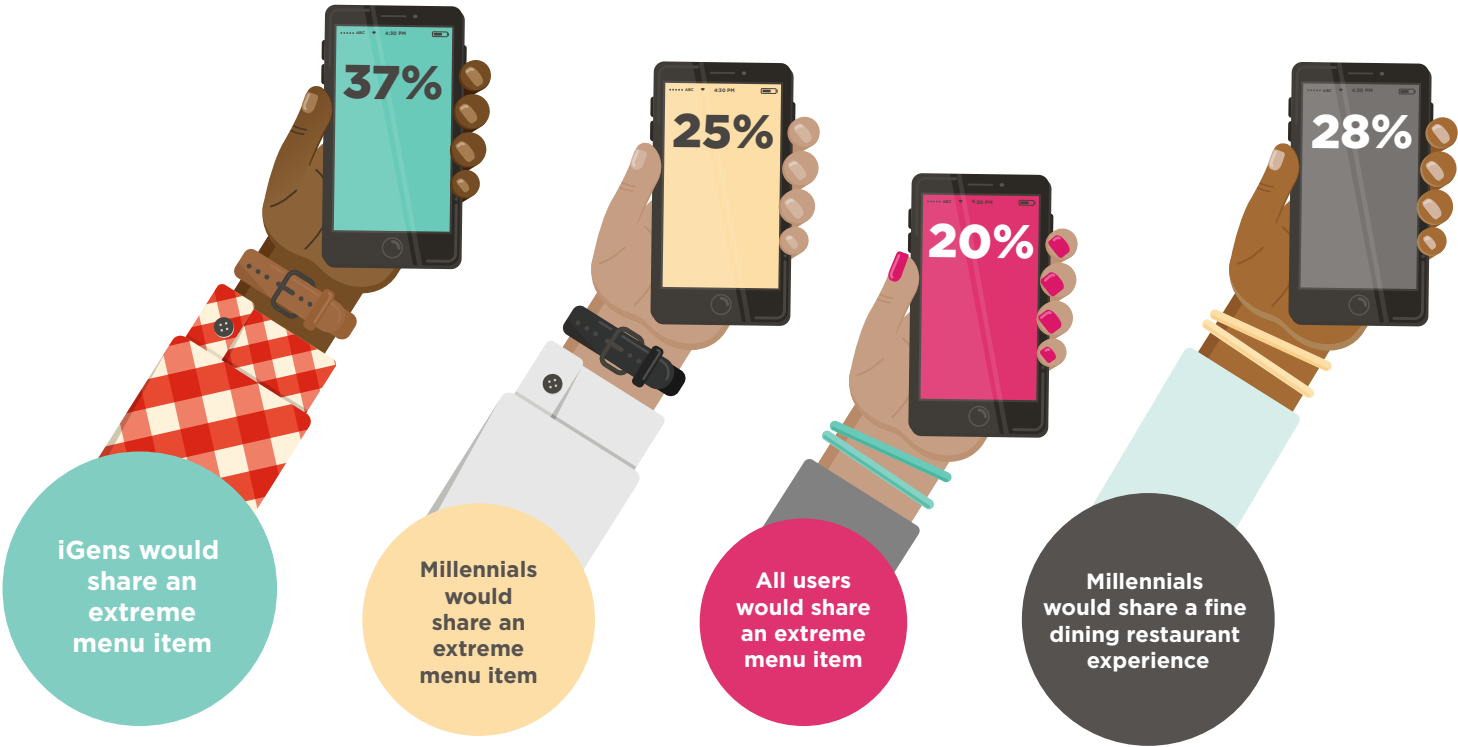
Base: 1,888 internet users aged 18+ who have dined out in the past three months | Source: Lightspeed/Mintel

Market Trends
Craft + Dining
“Extreme” for Social

MILLENNIALS CREATE A BALANCE
BETWEEN QUALITY AND EXTREME FOOD

CONSUMER SOCIAL MEDIA SHARING HABITS

The concept of “Instagram based food and drinks” is often associated with the Millennial generation; however, the iGeneration is also playing a big role in driving these trends. As Millennials move into older age range with more disposable income, they’re creating a more distinct balance on social media by showcasing higher quality dining experiences without completely ignoring the latest social media viral sensation.



Base: 1,888 internet users age 18+ who dined out in the past three months and are on social media | Source: Lightspeed/Mintel

Inspiration + Competition

We have explored, critiqued and compared the various restaurant and bar venues that share many common elements as the Hangar. Some of these were provided by the Hangar team as “successful” for one reason or another and provided us with some insight as where the Hangar is headed. Others we

collected from the region, which might be seen as competitors or might be seen as an alternative for consumers.

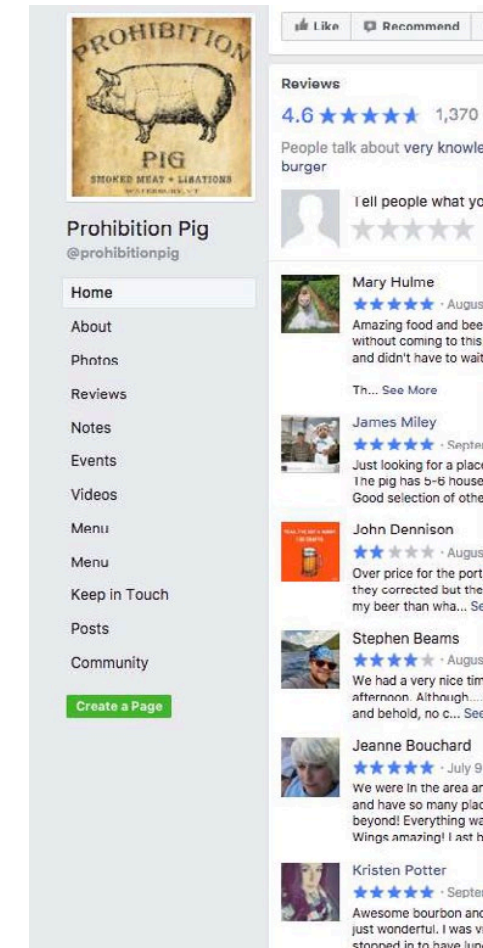
We use these inspiration and competition comparisons to help identify the areas that make the Hangar unique and highlight areas where we can improve.

Prohibition Pig

Concept, consistency and execution. This brand is not a direct competitor in terms of aesthetic, but produce a similar product with a similar scale of production.

What we noticed:

- Successful integration of two physical spaces under one brand.
- Clarity and consistency in web design makes the distinction between these physical spaces clear and accessible.
- Strong social media presence that positions their business as a social experience revolving around events and quality, indulgent dishes with unique flavors and fresh ingredients.

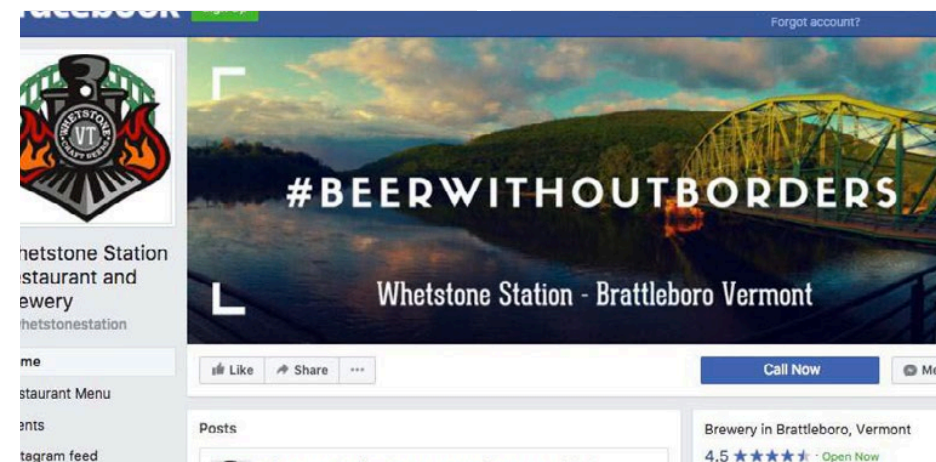


Whetstone Station

Concept, consistency and execution. This brand is not a direct competitor in terms of aesthetic, but produce a similar product with a similar scale of production.

What we noticed:

- Several unique experiences in one location, differentiated and supported by a single, organized website.
- Clear, engaging language on landing page creates a unified brand message.
- Powerful, consistent food and location photography creates a brand based on destination.



Stony Creek

Concept, consistency and execution. This brand is not a direct competitor in terms of aesthetic, but produce a similar product with a similar scale of production.

What we noticed:

- Online presence dominated by beer offerings and packaging.
- Social aspect of the brewery is downplayed in favor identity of various craft beers.
- Food and physical space is not a major element of brand identity.



THE CRANKIES

Each one a bit crankier than the other, our IPAs are certainly and assertive just like their namesake the Great Blue Heron ("The Big Cranky"). Big Hop flavors with surprising drinkability about to get cranky!



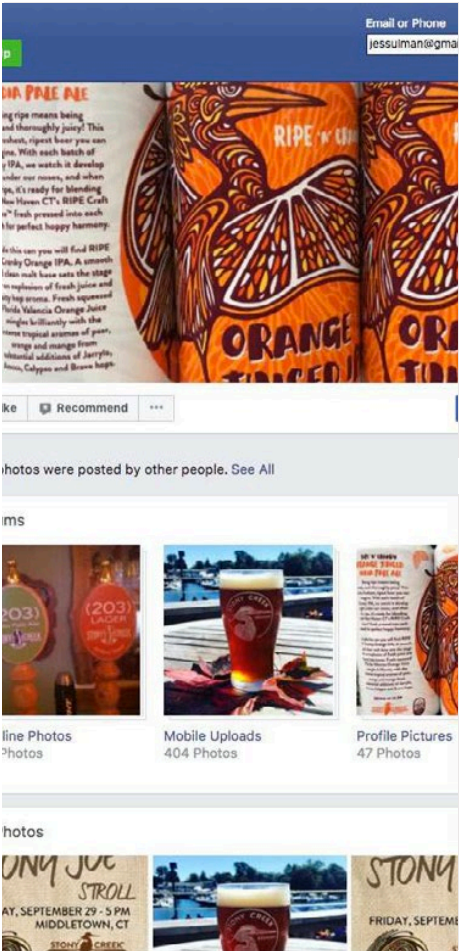
CRANKY
IPA
6.8% ALC/VOL | 68 IBU | 12 FL. OZ.



BIG CRANKY
DOUBLE IPA
9.5% ALC/VOL | 95 IBU | 16 FL. OZ.



LITTLE CRANKY
SESSION IPA
4.5% ALC/VOL | 50 IBU | 12 FL. OZ.

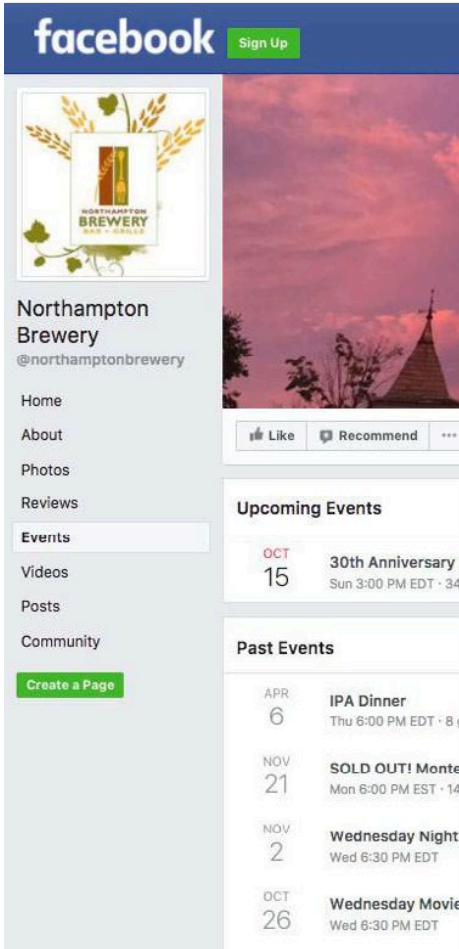
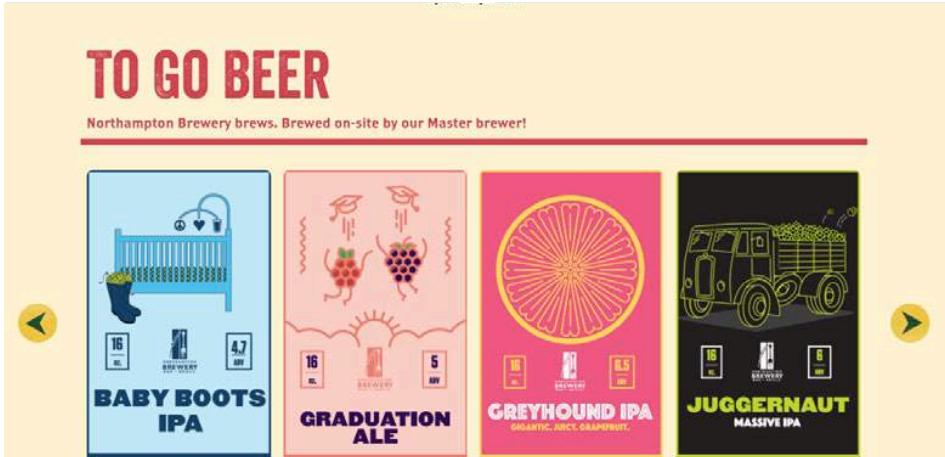
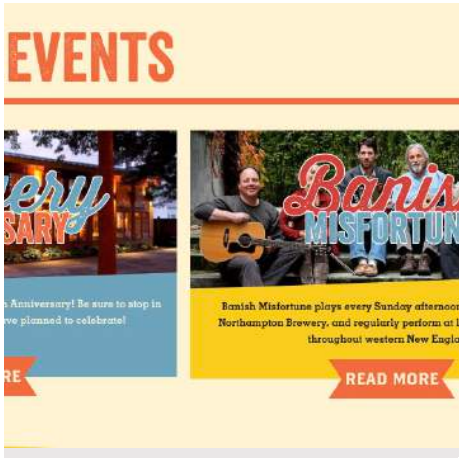


Northampton Brewery

Concept, consistency and execution. This brand is not a direct competitor in terms of aesthetic, but produce a similar product with a similar scale of production.

What we noticed:

- Leverages craft beer culture, with web presence highlighting beer offerings first and foremost.
- Social media presence dominated by beer and packaging.
- Brewery events center around new craft beer selections and music groups.



What We See + Hear

What We Hear. **The Hangar**

In our recent discussion, these were the top terms and phrases raised by the team.

QUALITY
ACCESSIBLE
QUIRKY
LIGHT-HEARTED
SOUL
EXCELLENCE
PEOPLE
ATTENTIVE
VALUE PERCEPTION
ATMOSPHERE

What We Hear. The Hangar

Key quotes we heard.

“It’s a big sloppy plate of food, people love it, that’s what they come here for.”

“There’s always something that somebody likes - 25 sauces, 12 beers.”

What We Hear.

The Hangar

The results of our questionnaire reveal the main points of focus for the brand and media development.

Rank	1	2	3	4	5	Total Votes	Total Points
Points	5	4	3	2	1		
	4	2	0	1	0	7	30
	0	1	0	0	2	3	6
	0	0	1	0	0	1	3
	0	1	0	0	1	2	5
	0	2	0	2	1	5	13
	0	0	0	0	0	0	0
	0	1	1	3	2	7	15
	1	0	0	0	0	1	5
	2	0	2	1	0	2	18
	0	0	2	0	1	2	7
	0	0	0	0	0	0	0

The Hangar Pub & Grill Attributes

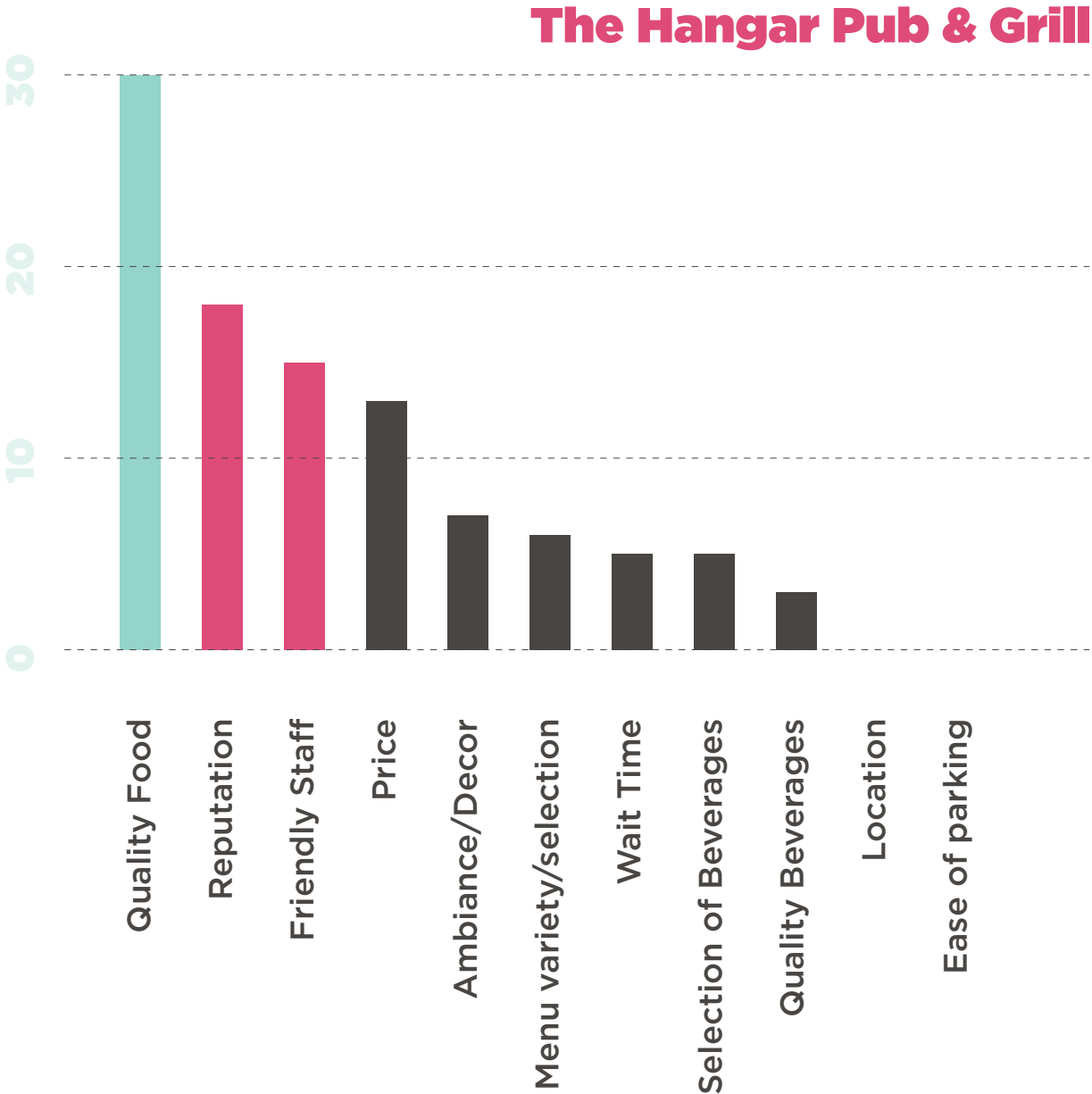
- Quality Food
- Menu variety/selection
- Quality Beverages
- Selection of Beverages
- Price
- Location
- Friendly Staff
- Wait Time
- Reputation
- Ambiance/Decor
- Ease of parking

Good Food
Community
Great People

What We Hear.

The Hangar

The results of our questionnaire reveal the main points of focus for the brand and media development.



What We Hear. Amherst Brewing

In our recent discussion, these were the top terms and phrases raised by the team.

**TASTE
ACCESSIBLE
EXPERIENCE
DIVERSITY OF STYLES
INNOVATION
EXPERIMENTAL
NIMBLE
LEGACY
EDUCATIONAL**

What We Hear. Amherst Brewing

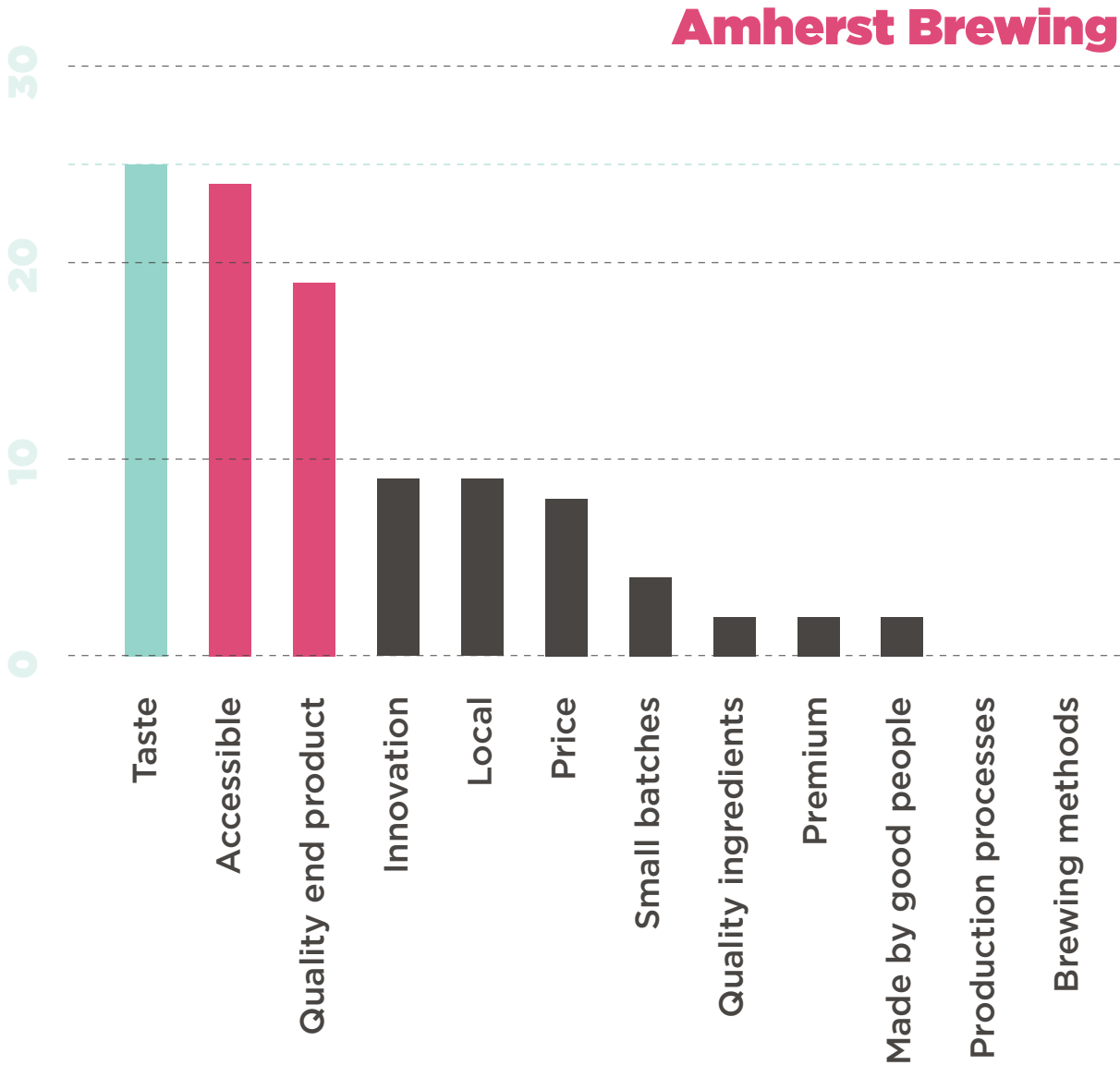
Key quotes we heard.

“We’d never ask the staff to sell a product they couldn’t get behind.”

“You can always get beer here, there’s always something in the cooler to buy, there’s something for everyone.”

What We Hear.
Amherst Brewing

The results of our questionnaire reveal the main points of focus for the brand and media development.



Brand Strategy

In this section, we explore several different brand and corporate strategies to strengthen and connect the three individual brands. These are not proposals or recommendations, but a presentation of options (in the abstract) for discussion and alignment. It prompts the team to answer, “which one

of these best fits our needs as a group of companies, and as an individual outlet. There are many graphic solutions to the strategies that are more and less extreme, but we are hoping to better understand which options best suit the organization.

What We See. The Hangar

Exploring the strengths, weaknesses, opportunities and threats for The Hangar in the marketplace.

THE HANGAR PUB & GRILL
SWOT ANALYSIS



What We See. Amherst Brewing

Exploring the strengths, weaknesses, opportunities and threats for Amherst Brewing in the marketplace.

AMHERST BREWING

SWOT ANALYSIS



Brand Situation

Three Outlets,
Three Identities

As they exist today, there is little visual brand interconnection and messaging that illustrates the relationship between these brands.

We believe that each of these provides a unique and powerful product and are entirely capable of strengthening and growing the other businesses through an integrated branding and/or messaging solution.

Building a simultaneous strategy for three outlets, rather than “fixing” one, allows more flexibility and consistency for the purpose of growing all three.



AMHERST BREWING | THE HANGAR | WINGS OVER

Cross-Branding

Strategy

Allow the three brands to operate independently, and develop and integrate a graphic element and messaging tactic from the Hangar into the Amherst Brewing and Wings Over brands (this is done to some extent with Wings Over). Use messaging and media to cross-promote these three independent outlets.

Pros

- Minimal impact on existing brands, with primary impact on Amherst Brewing brand.
- Though independent, the Hangar benefits from a centralized role in its relationship with the sub-brands
- The sub-brands remain distinct within their industry

Cons

- Relies mainly on messaging and media to clarify the relationship between the three distinct brands.
- May not fully address brand confusion in the public eye

Brand Audit + Recommendations

Amherst Brewing + The Hangar



AMHERST BREWING

THE HANGAR

WINGS OVER



[example: Coca Cola Company]

Up-Branding

Strategy

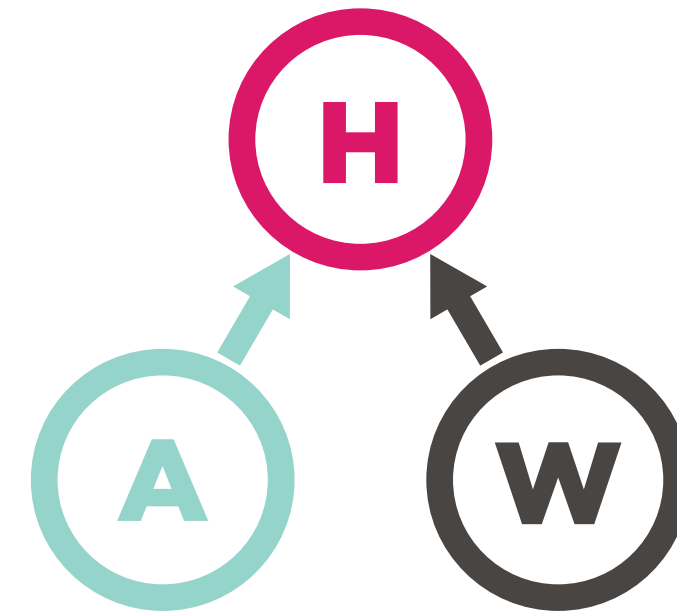
Develop The Hangar into a primary brand that is clearly and articulately supported by its sub-brands. This challenges the Amherst Brewing brand to adapt its brand to more clearly fall under the Hangar brand.

Pros

- The Hangar is the driving force of the brand
- The Hangar receives the brand equity from the other outlets
- The sub-brands remain distinct within their industry

Cons

- May not fully address brand confusion in the public eye
- The Hangar brand is responsible for clarifying sub-brands



THE HANGAR

AMHERST BREWING

WINGS OVER

amazon

amazon
web services

audible
an amazon company

[example: amazon]

Collective-Branding

Strategy

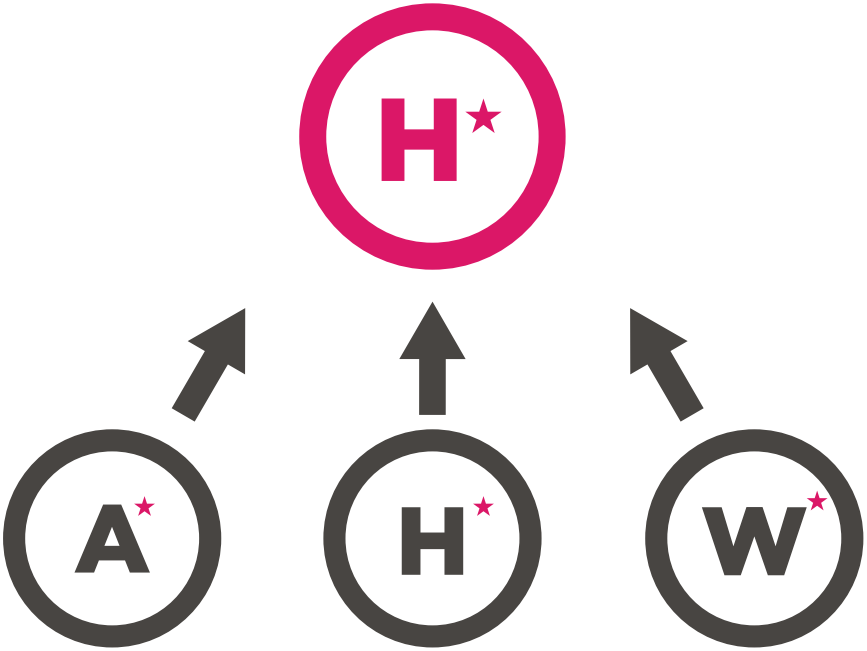
Develop a new primary umbrella brand that both connects and supports the three distinct primary brands. In this strategy, the sub-brands remain unique and independent and the new brand is utilized to tie the brands and products together with a new mark and a clear messaging strategy.

Pros

- Centralized information about the various brands clearly addresses brand confusion.
- All sub-brands stand to benefit from clear brand structure
- The sub-brands remain distinct within their industry

Cons

- The new primary brand elements must visually disseminate into the sub-brands to tether them all together.



★ HANGAR WINGS + BREWING

AMHERST BREWING | THE HANGAR | WINGS OVER



[example: Anheuser-Busch]

Strategic-Branding

Strategy

Fully integrate the Hangar and Amherst Brewing brands as a single brand. This can take on various forms, but would more strongly tether these two outlets together through its brand and nomenclature.

Pros

- Primary impact only on one brand - Amherst Brewing
- Though independent, the Hangar benefits from a centralized role in its relationship with the sub-brands
- The confusion between the Hangar and Amherst Brewing brands is eliminated

Cons

- The existing Amherst Brewing brand sheds some of its existing brand equity in order to strengthen its connection for the long term.
- Relies on messaging and media to educate the consumer about the new brand relationship.



**THE HANGAR
AMHERST BREWING**



WINGS OVER



[example: Apple, with Intel]

Recommendations

- Articulate and communicate the strengths and uniqueness of each brand experience and the collective power of their shared values.
- Develop a clear brand strategy that interconnects the three primary brands to strengthen and grow each outlet.
- Develop a professional and consistent photographic style to enhance the perception of each brand.
- Create a centralized web presence that clarifies and articulates the relationship of the three brands.
- Create and deploy a strong and clear messaging strategy across all social media and web presences to broaden the appeal to the widest possible consumer base.

Next Steps

- We will explore ways to link the brand identities together visually through some combination of color, typography, spatial relationship, and/or supporting copy.
- Each phase of visual explorations will provide details and parameters for how the solution could be applied to advance the goals we have discussed previously, and how the proposed association of both brands could play out in packaging.
- We will provide conceptual sample art to illustrate the way the beer branding and restaurant branding will come together – i.e. a menu and 4-pack box to correspond to each brand solution.



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THANK YOU

For your time +
creative energy.

Research Sources

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