

THE REBIRTH OF BOURBON

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ECONOMICS OF VICE

**THE REBIRTH OF
BOURBON: BUILDING
A TOURISM ECONOMY IN
SMALL-TOWN, USA**

STEVE COOMES

Freelance Writer, USA

KIM HUSTON

*President, Nelson County Economic
Development Agency, USA*

MIKE MANGEOT

Former Bardstown Tourism Director, USA



United Kingdom – North America – Japan – India
Malaysia – China

Emerald Publishing Limited
Howard House, Wagon Lane, Bingley BD16 1WA, UK

First edition 2020

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British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British Library

ISBN: 978-1-83867-714-5 (Print)

ISBN: 978-1-83867-711-4 (Online)

ISBN: 978-1-83867-713-8 (Epub)



ISOQAR
REGISTERED

Certificate Number 1985
ISO 14001

ISOQAR certified
Management System,
awarded to Emerald
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Environmental
standard
ISO 14001:2004.



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FOREWORDS

THE BUSINESS OF BOURBON IS BOOMING

*Kim Huston, President, Nelson County Economic
Development Agency*

If you were to ask me 10 years ago how hard would it be to locate a new bourbon distillery to Bardstown, I would have grimaced and answered honestly, “pretty difficult.” If you were to ask me that same question today my answer would be, “surprisingly not too hard,” and I’d have good stats to back that up.

In the past 10 years, four new distilleries have located in Nelson County, and each of the four existing distilleries have spent millions of dollars on expansion projects resulting in hundreds of new and good-paying jobs.

Why Bardstown? What is the secret formula for enticing new distilleries to locate here? There are many theories and even better stories, but sometimes it’s as easy as involving our local wildlife.

A few years ago, David Bratcher, President and COO of LUXCO (Owner of Lux Row Distillery) came to visit a site on which the company might build a distillery. I had just the place in mind: a beautiful 70-plus acre farm in the city limits and, as an extra bonus, halfway between Jim Beam and Makers Mark Distilleries. Its long, pin oak tree-lined driveway makes you feel as though you’re headed to your country estate. On this day, I got lucky: a deer was standing off to the right of the driveway

as if staged for a movie. The timing could not have been more perfect; it was like, “*Cue the deer,*” and there it was grazing in the grass without a care in the world. It was as at home in that setting as we hoped Mr Bratcher would feel. As we pulled onto the farm we were welcomed by black lab named Joker, and a set of three flashy peacocks. Talk about making an entrance. Apparently, all that wildlife made the site visit memorable as LUXCO chairman and CEO, Donn Lux, purchased the property and built a gorgeous state-of-the-art distillery on that picturesque vista. The peacocks came with the sale.

What I have come to realize is that when you integrate the business of world-renowned bourbon making into your county’s economic development portfolio, things change for the better. We all know that as a spirit, it eases conversation and conviviality. And as an industry, bourbon and its allure have proven attractive to other businesses. Many new companies love to tout that they have located their operations in the “*Bourbon Capital of the World®*,” which has made my job of recruiting them a bit more fun.

With fully one-third of all Kentucky-made bourbon being produced in Nelson County, it makes sense that other distilleries want to be in the epicenter of all things bourbon. Bardstown has the infrastructure, water and land, supporting industries and the shared experience of generations of distilling legends all here.

When completely unrelated businesses look at what’s happening with the bourbon industry, they realize Bardstown must have developed a great formula for being a location where you can be successful in any business and play on a national stage. In the past 12 years, we’ve seen eight domestic manufacturers and four international manufacturers build multimillion-dollar facilities here, which is significant for a town our size. We were also excited to successfully recruit three new flag hotels to Bardstown in 2019. We’ve happily

welcomed them into our corporate family and are thankful for the jobs and taxes they will provide.

Achieving such growth in our business sector was no walk in the park. On August 5, 2015, I felt like I got taken to the woodshed by Bill Samuels, Jr chairman emeritus at Maker's Mark and an icon in the bourbon industry. Bill, a good friend who was born and raised in Bardstown but now lives near Louisville, told me and two other community leaders that we basically needed to step up our game because other cities were. (Actually, his words were more colorful than that as you will read in the book.) He made us realize we had become complacent in believing our self-proclaimed Bourbon Capital title could not be taken away. Yet Louisville, our big-city neighbor, with its unlimited resources, was doing just that with the development of its Whiskey Row and various bourbon experiences. It was after Bill's professional scolding that we recognized the need to take a strategic approach to improving our bourbon tourism position. No one distillery, restaurant or hotel could accomplish that on its own, rather a massive collaborative effort by most every significant entity in the community was needed to pull it off.

What resulted was the formation of the Bourbon Capital Community Alliance (BCCA), whose members created a vision that addressed bourbon tourism actively, not passively. For too long Bardstownians had watched visitors come and go, entertained them while they were here, but never considered as a group how to keep visitors here longer and give them more reasons to return.

Part of the BCCA's mission statement is this: "... to facilitate, foster and endow projects and programs that enhance experiences, knowledge and awareness for visitors and residents of the Bourbon Capital Area." To that aim, BCCA members said, Bardstown needed to increase marketing, enrich the city's brand equity, court spirits and travel writers, build brand awareness

through social media campaigns, and consistently train workers at every level of the hospitality community to create elevated bourbon-related experiences. In short that meant all of us needed to up our game and work overtime to do that.

Part of that vision came from visits I and several Bardstown colleagues made to some Napa Valley communities in the California Wine Country. As Bardstown is today amid the bourbon boom, wine country towns underwent a similar shift from quiet, agriculture-centric communities to tourism destinations when its wines gained notoriety on a global stage. Towns like Healdsburg, Yountville and Sonoma once were just easy-going small towns with affordable places to live and do business. But beginning in the mid-1980s, as tourists flocked to wineries there, upscale restaurants, specialty stores and boutique hotels followed and changed Napa Valley into an internationally well-known destination.

Subsequently, there's been a lot of discussion about the "Napa-fication of Bardstown," which is a clever way of implying how our historic city will inevitably change due to the soaring popularity and production of bourbon. But as you'll discover by reading this book, the differences between Napa Valley and Central Kentucky are so plentiful that it's unlikely the Napa nickname will stick as Bardstown transforms into its own new identity over the coming years.

Make no mistake: Our goal, and even dream, is to be like Napa Valley by playing on the international tourism stage and by leveraging Kentucky bourbon as our primary vehicle. And if the last 10 years are any indication of what is to come, it'll be a distinctly Bardstown experience, one as authentic as the bourbons made here, as hospitable as the people who call it home, and as worthy of multiple visits as it's always been.

Enjoy reading about our bourbon boom and the cast of characters who helped to make it all happen and make plans to come and experience it for yourself.

BARDSTOWN DIDN'T CALL ITSELF
"THE BOURBON CAPITAL OF THE WORLD®"
FOR NOTHING

*Mike Mangeot, Former Executive Director of Bardstown
Nelson County Tourism and Convention Commission*

I've been in the tourism business for nearly all my life – far longer than I was paid for it, for sure. When I was a kid, my father was President and CEO of the Kentucky Derby Festival, the largest civic celebration in the United States, for 17 years. That made me an indentured servant whenever its many events needed another set of hands and feet, which seemed like constantly for Mangeot children. I didn't always find that fun as a kid, but like most adults with similar experiences, I look back on them fondly as well as formative.

My résumé certainly reflects the results of that exposure: multiple state and national posts and boards for marketing, tourism and economic development positions, the details of which I'll mercifully not list. So, what drew me to this position? The answer is simple. Bardstown has what every tourist wants: authenticity. It also has what every marketer needs: a unique selling proposition – the Bourbon Capital of the World®.

But what surprised me the most was that we weren't leading with bourbon in our marketing efforts. In 2012, Rand McNally dubbed this "The Most Beautiful Small Town in America," which became the primary tag line for all of our marketing and advertising. While this designation might lead one to imagine visits here are living Norman Rockwell paintings, and believe me there's plenty of that, there are beautiful small towns all

over the world. While it's an asset, it doesn't separate us from our competition. Bardstown didn't name itself the Bourbon Capital of the World® just for marketing purposes. It did so because no other place really could. Here's why.

Bardstown has a rich history in bourbon making, which we will explore later in the book, but so do many other Kentucky towns. What really sets Bardstown apart is that so many of the families that have helped create the bourbon industry – Beams, Samuels, Willetts, Shapiras, Dants and Noes – all continue to have homes and/or ties to this community. Our history and heritage aren't fabricated. If you stop by one of our local restaurants or walk down the street for a cup of coffee, there is a pretty good chance you'll see one of our master distillers.

True story: When I started my position, I hired an advertising agency out of Louisville. I invited the team to Bardstown for a tour and as we were walking through downtown, we passed a young man on his way to get his wife a cup of coffee from the local coffee shop. It was Freddie Noe, eighth generation distiller from Jim Beam. Following our tour, we ended up at a new restaurant that a local distillery just opened. Sitting in the restaurant at the time were master distillers from Heaven Hill, Bardstown Bourbon Company and Willett Distillery. I looked at the advertising team and said, "You've been here half a day and have seen four master distillers. Tell me, where else you can do that?" It wasn't a set-up, it's what happens here every day. In a word, it's authentic.

That visit led to our new, nationally recognized and award-winning advertising campaign, "Bourbon Comes from Bardstown." We're a small town with a small marketing budget in a highly competitive industry. We needed to make a bold statement and replant the flag that if you want the original and authentic bourbon experience, you had to visit the Bourbon Capital of the World®. The essence of the campaign is this: While bourbon can be made anywhere in the United States,

when you visit and see how ingrained this industry is in our town, meet the people who make it, walk through the rick-houses and literally smell the bourbon in the air, there's no mistaking bourbon comes from Bardstown.

Let's discuss bourbon production for just a second: In 2019, Kentucky distillers filled 2.1 million barrels of bourbon, crushing the old record set back in the 1960s. When that high mark was registered, bourbon was many things, but none terribly sexy. It was a product, it was a job, a retail shelf filler, a source of tax revenue, and a source of income for fortunate advertising firms. But nobody came to Bardstown – or anywhere in Kentucky for that matter – to see bourbon made, bottled or barreled. In the minds of most bourbon consumers of that day, bourbon came from a liquor store. And if they bought it, why tell them otherwise?

But only a decade would pass before bourbon sales nosedived. Spirits drinkers were falling for and buying loads of vodka, gin and tequila while bourbon, the quintessential American spirit, languished.

It wasn't until the late 1990s that appreciation for bourbon returned, along with an appreciation for the craftsmanship that goes into making it. Not surprisingly, sales began creeping northward. And as bourbon's future brightened, a curious thing happened: People started to visit Kentucky distilleries to see not just bourbon made – but *their bourbon* made. Suddenly people weren't just fond of bourbon, in general, they were fans of bourbon specifically. Gradually, these enthusiasts turned into a tourism director's dream: talking advertisements who told others who told others and others still about how cool it was to visit Heaven Hill Distillery, Barton 1792 Distillery and Willet Distillery in Bardstown.

Fast-forward to 2018, when roughly 1.7 million visits were logged at Kentucky distilleries large and small. That was great news for distillery owners, and it presented many opportunities for hoteliers, restaurateurs or craft cocktail bar owners.

But while other Kentucky cities like Louisville and Lexington have all the above in spades, Bardstown needs more of all three.

This amazing small town of 13,000 people, Kentucky's second-oldest city, is in reaction mode to a pretty desirable problem. Hundreds of thousands of American whiskey fans are coming here annually for distillery tours, and they want to eat here, drink here and stay here. As of this writing, Bardstown has three hotels under construction and its Airbnb community has grown so quickly that city officials had to set new regulations for managed growth. Additional restaurants and bars that will provide more elevated eating and drinking experiences are in the works, yet some days it seems they can't open fast enough.

While Bardstown is thrilled with the countless opportunities bourbon tourism has placed in our hands, we also want visitors to sample other options on our tourism menu. Headliners like My Old Kentucky Home State Park, The Stephen Foster Story musical, My Old Kentucky Dinner Train, a nationally recognized Civil War Museum, Kentucky Railway Museum, along with a wide range of retail shopping options have been visitor mainstays for decades. Frankly, we think they're every bit as cool as bourbon. But make no mistake, what's driving our tourism economy right now is bourbon.

Come see us soon in the Bourbon Capital of the World® and find out why we say, "Bourbon Comes from Bardstown"!*

* Shortly after the original manuscript for this book was submitted, Mike Mangeot resigned his post as *Executive Director of Bardstown Nelson County Tourism and Convention Commission* to become Commissioner of the Kentucky Department of Tourism in January 2020.

ACKNOWLEDGMENTS

The authors would like to thank Kentucky Utilities and Louisville Gas & Electric for their support of this book.

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INTRODUCTION

The Call to Reclaim the Title of “The Bourbon Capital of the World®”

Ask anyone in the Kentucky whiskey industry to name the most influential voice in the business, and they’ll likely say Bill Samuels, Jr. When Samuels, the chairman emeritus at Maker’s Mark, talks, people listen. Whether in one-on-one conversation or speaking to hundreds of Kentucky legislators at the capitol building in Frankfort, he pulls no punches, but rarely fails to charm. His remarks are occasionally bracing, usually entertaining and always enlightening. When it comes to bourbon promotion, there’s none wiser, none more energetic, nor anyone more vocal than the failed rocket scientist who transformed his parents’ upstart whiskey brand and rural distillery into the quintessential icon of bourbon tourism.

In 2015, Samuels found himself compelled to speak privately and forcefully with a small group of Bardstown, KY, civic leaders about the town’s present and future as a bourbon tourism destination. Years before, Bardstown had claimed the title of Bourbon Capital of the World®, yet according to Samuels, Bardstown hadn’t lived up to that lofty assertion.

All throughout Kentucky, and especially in Louisville and Lexington, the commonwealth’s largest cities, distilleries were under construction, new bourbon-centric events and experiences were popping up, and the surging number of stops being added to the Kentucky Bourbon Trail (KBT) annually were

drawing attention and visitors away from Bardstown. Heaven Hill Distillery had opened its Bourbon Heritage Center in Bardstown in 2004, preceding the opening of the American Stillhouse visitors experience at Jim Beam, 20 minutes away in Clermont. And near the time of Samuels's 2015 meeting, Bardstown Bourbon Co. was preparing to break ground on a one-of-kind distillery. All this was but a fraction of what was happening across the state.

Samuels's point was: Distilleries were doing their part to maximize the benefits of the ongoing bourbon boom by expanding production, building barrel rickhouses and updating or creating new visitor experiences. But Bardstown, the seat of historic Nelson County, the center of whiskey production in Kentucky and the United States, had to improve its position and offerings as a bourbon tourism destination.

To manage what had already become large crowds pouring into the town for distillery tours, Samuels said the city needed infrastructure improvements, more hotel rooms for overnight stays, and better restaurants with hard-to-find whiskey and upscale cocktail offerings. Loads of trained hospitality pros who could deliver those experiences were also required. Visitors, he said, routinely drove to Bardstown to see Barton 1792 Distillery, Willett Distillery, the Oscar Getz Whiskey Museum and other spirits attractions, but too often those guests retreated to nearby cities for overnight stays, better bars and restaurants.

"We need to get on the stick and live up to that title of Bourbon Capital," he told the small gathering. Though a resident of Louisville, Samuels grew up in Bardstown and felt a personal calling to tell city officials that if they didn't act quickly, they'd miss an opportunity of a lifetime. The bourbon boom, he said, would make an economic impact that would benefit the city in myriad ways for years to come.

“I used every bit of obnoxiousness in my body to get their attention, and perhaps it wasn’t polite. ... I can be blunt,” Samuels said, acknowledging the understatement with a slight grin. “I think most everyone knew I was only saying what needed to be said.”

Samuels had earned the right to be heavy handed, because he and his family had walked the talk during his half-century career at Maker’s Mark. His engaging blend of charisma and tireless promotion helped expand the brand beyond the dreams of his father, Bill Samuels, Sr, who obsessed over the quality of his wheated bourbon. Just as importantly was the contribution from his mother, Margie Samuels, the genius behind every Maker’s bottle’s red waxed neck. She also was the creator of Maker’s engaging tourism experience that was decades ahead of all competitors.

To prove the distilleries in Nelson County (and next door Marion County, which is home to Maker’s) were serious, Samuels told the group that his distillery was a year away from opening the world’s first Whisky Cave (a space blasted into a limestone hill and in which its Private Select barrels are aged) and that a significant restaurant and bar, dubbed Star Hill Provisions, was on the way.

Kevin Smith also was at the meeting. The vice president of Kentucky Bourbon Affairs at Beam Suntory hinted that big plans were afoot on Jim Beam’s Clermont distillery campus, where an events center had been green lighted for construction.

Another distillery representative, Bardstown Bourbon Co.’s then-CEO, David Mandell, added his own vision to the conversation: that of a stunning and modern distillery that would eventually include a restaurant and bar and boutique hotel. It was his outsider’s perspective on Bardstown tourism, however, that piqued the group’s attention.

“I once asked Bill (Samuels), ‘When you come to Bardstown, do you feel like you’re coming to the Bourbon Capital of the World?’” said Mandell, a Washington, D.C., native. “I remember coming to the Kentucky Bourbon Festival here one year and not really knowing it was going on. There were a lot of people in town, but there was no signage, that I saw at least, promoting this amazing event as it was happening.”

Listening closely to the men’s comments were Dick Heaton, a former Bardstown mayor and local Ford dealership owner, his wife Alice Heaton (who managed Old Kentucky Home State Park for 30 years) and Kim Huston, the longtime president of Nelson County Economic Development Agency. Each agreed things needed changing and shared their gratitude for the distillers’ willingness to lead the charge. Huston recalled the meeting as a lively, timely and wholly necessary discussion.

“Bill basically told us, ‘Y’all need to step the hell up!’” Huston said. “OK, that might not have been exactly what he said, but that was the message I heard – one we needed to hear, frankly. Bardstown needed to step up because the other people in the room were.”

Huston called Samuels’ upbraiding “direct, smart and right” because “Bardstown had grown complacent over the years.” Nelson County’s whiskey-making heritage extended back to the late 1700s, and by virtue of that, she said, “it was easy to slide into thinking, ‘Why put any effort into it when it’s always been here and always will be? It’s in our DNA.’ We needed them to open our eyes some to see Bardstown’s potential.”

While also giving a firm warning: According to Smith, Samuels believed that if Bardstown didn’t reclaim its position as the Bourbon Capital of the World®, another community could seize the mantle.

“Bill made his point by talking about how Nashville had lost a big part of its control over the country music industry

to Branson, MO,” Smith said. “People there said no one will ever take that away, but it happened, and he didn’t want Bardstown to make the same mistake.”

BARDSTOWN THEN, BARDSTOWN NOW

Before Kentucky became the nation’s 15th state in 1792, it was an undeveloped extension of Virginia. Settlers of Nelson County, named after Thomas Nelson, Jr (one-time Virginia governor and a signer of the Declaration of Independence) found the area’s land favorable for farming, grazing livestock and worth living on permanently. Natural water sources were abundant, and the area’s location atop a limestone shelf meant that its well and spring water were ideal for distilling. Eighteenth century famers commonly distilled excess grain into whiskey for personal consumption and traded it for other necessities.

According to the book, *Before Prohibition: Distilleries in Nelson County Kentucky*, author Dixie Hibbs claimed that an estimated 2,000 distillers were producing whiskey in Kentucky by 1811.¹ Most of these were farmer distillers, whose operations were diminutive even when compared to today’s craft distilleries making a barrel or two a day. But with modernization came professionalism and consolidation, and by 1896, 26 commercial distilleries were operating in Nelson County. Doubtless many illegal distilleries remained at work during this time and for years to come.

Just 24 years later, when the Volstead Act became law and referred to as Prohibition, all 12 of the area’s distilleries closed. The negative impact on Nelson County residents was profound and nearly devastating to the local economy. Every distiller, bottler, barrel house manager, whiskey salesperson and many others were now jobless. Farmers lost their largest grain

buyers, cooperages no longer had customers and label printers and bottle makers saw huge pieces of their business melt away.

According to Hibbs, many locals left Bardstown in hopes of finding work in other cities, while others stayed and considered their options.

“We often say our Great Depression started in 1920, when Prohibition took our jobs,” said Hibbs, a former Bardstown mayor, city councilwoman and lifelong Nelson County historian. “Bardstown was years ahead of the curve on the Depression.”

Hibbs said that while many regarded the loss of so many jobs connected to – but not directly in the distilling business – as unintended consequences of Prohibition, “One of the biggest and most positive unintended consequences of Prohibition was Bardstown deciding to get into tourism.”

Ramping up those tourism initiatives would happen gradually over the following 80 years. Some notable tourism milestones set during that time included:

- With support from state legislators in Frankfort, an historic home named Federal Hill was purchased and reopened as My Old Kentucky Home. The land around the home was turned into a state park with historic sites, campgrounds and a golf course. The site also included an amphitheater which would become the stage for “The Stephen Foster Story,” a musical based on the life of America’s first great composer. The show has been performed continuously since 1959.
- Throughout the late 1700s and 1800s, Bardstown became a bastion of Catholicism and the site of the first parish established west of the Allegheny Mountains. The subsequent construction and consecration of St Joseph Proto-Cathedral followed in 1823 provided pilgrims and admirers reasons to journey there. The Abbey of Our Lady of Gethsemani, located about

20 minutes outside the town, also became a gathering place for Catholics eager for silent retreats and walks along the grounds where Thomas Merton, the famous Trappist monk and prodigious author, spent years writing and praying.

- As a temporary camp for Union and Confederate troops moving across the country during the Civil War, Bardstown's connection to the War Between the States ran deep. That led to the construction of The Civil War Museum, a multi-building exhibit dedicated to the war's Western Theater. Its creation happened in stages throughout the 1990s.
- Bourbon tourism made a humble start in the early 1970s in response to significant sales declines in the wake of US sales increases of vodka, gin and tequila. Heaven Hill president Max Shapira can't recall the exact date, but around the same time, the distillery created the Tour Mobile. A vehicle of multiple iterations, the Tour Mobile picked up passengers at the center of Bardstown, took them on a brief tour through the town and to its distillery.

"Bourbon wasn't exactly on fire at that time, so we didn't have this massive attraction that you enjoy today," he said. The tour included a brief look at the distillery and the bottling house. "It was a bit haphazard and not really organized. A visitor could stop by, knock on the door and say, 'Could you give me a tour?' Then we'd try to find somebody to take them around. It was an informal presence to say the least."

BOURBON BOOMS, BARDSTOWN FOLLOWS

Few years have produced as much evidence of the bourbon boom's impact on Nelson County as 2019. Three new hotels

are under construction, and three of the city's largest distilleries have announced plans for new visitor experiences or the expansion and upgrade of existing components. It's hard to drive around the area without spotting new rickhouses rising frequently. While older rickhouses commonly held about 20,000 barrels, many newer models have an extraordinary capacity of 56,000 barrels. Not surprisingly, announcements of forthcoming distilleries are increasingly common.

- In July, Wally Dant, a distant relative of the J. W. Dant distilling family, announced a \$12 million commitment to build Log Still Distillery on the Gethsemane site of the last Dant distillery.
- In September, Bardstown Bourbon Co. opened an expanded visitors center that includes an immersive spirits analysis experience, a distillery tour and cocktail making classes inside a tasting room built within a rickhouse.
- In November, Heaven Hill opened phase 2 of its \$17 million expansion of its Bourbon Heritage Center. When phase 3 is completed, the facility will offer a You Do Bourbon educational experience, a restaurant, a rooftop cocktail lounge and an event space.
- Though there's no evidence of a distillery under construction at the site of Kentucky Owl Park, there's no shortage of interest in its future manifestation. The ambitious \$150 million project created by the SPI Group (owner of Stolichnaya Vodka) must first finish the park's groundwork before creating a whiskey distillery, bottling plant and rickhouses.
- "People say to me, 'I can't believe you haven't started putting up walls,' but the truth is, there's lots of site work that has to happen first before you build a distillery at an old rock quarry," said Dixon Dedman, co-creator of