

# 2022 Brand Homes Trends Report

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Trends and insights from 200+ Brand Homes

March 2022

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# About AnyRoad

**200+**

Brand Homes, Distilleries, and Breweries

**15M+**

Annual Visitors



## Edinburgh, Scotland

Distillery tours, cocktail classes, and tastings



## Mills River, NC and Chico, CA

Brewery tours



## Shelbyville, KY

Distillery tours, cocktail classes, tastings, and live music



## Avery Island, LA

TABASCO® Museum, guided tours, and cooking demos



## Bardstown, KY

Distillery/production/bottling tours, tastings, and events

# What is a Brand Home?

Venues that **connect brands and consumers** to build advocacy, foster community, and grow revenue.



**Breweries**



**Distilleries**



**Tasting Rooms**

# A huge opportunity for brands. Large and small.

**Johnnie Walker Opens £150 Million Tourist Experience In Edinburgh Town Center**

**Buffalo Trace celebrates record visitor numbers**

FEATURED

**Ground officially broken on \$200-million Horse Soldier Farms**

By Christopher Harris Commonwealth Journal Oct 19, 2021

**Four Roses opens new visitors' center at distillery in Kentucky**

Dec 8, 2021

**Maker's Mark creates limited edition batch of bourbon benefitting the Lee Initiative**

BUSINESS

**Covid-19 Lockdowns Spur Shift to High-End Liquor**

U.S. sales of spirits such as tequila and whiskey have grown at the fastest pace in decades as more Americans drink at home

# Executive Summary

# 2022 will be the biggest year ever for Brand Homes.



## In-person experiences are back in a big way

In-person now makes up 98% of experiences. Consumers are traveling further and spending 5x more per visit than in 2020.



## Experiences and guests are becoming more sophisticated

Customer expectations are increasing and brands are investing heavily in new visitor experiences in the US and overseas. Brand Homes that offer personalized experiences and 'add-ons' see 10% higher NPS.



## Staffing is the #1 ingredient for success

With peak booking season approaching in May and June, Brand Homes must act quickly to get their staffing and customer experience in place. Those that don't create reputational risk.



# Where does the data come from?

- ✓ **200+** Brand Homes using AnyRoad to engage with consumers from 146 countries (US and UK primary markets).
- ✓ **15M+** unique experiential records.
- ✓ **Behavioral + sentiment insights** - from experience types, NPS surveys, open text feedback analyzed via NLP, etc.
- ✓ **Operational analytics** - guest volume, experience types, services and bookings revenue, revenue per visit, etc.

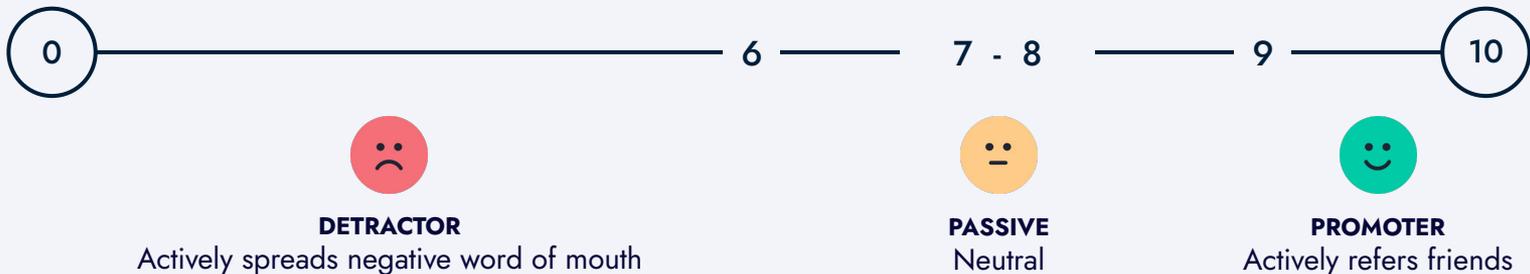


# What is net promoter score (NPS)?

The Net Promoter Score is a metric that informs your overall customer experience quality, based on your existing customers' likelihood to recommend your product, service, or organization. It is measured by subtracting the percentage of detractors from the percentage of promoters.

*For example, if 10% of respondents are detractors, 20% are passives and 70% are promoters, your NPS score would be  $70 - 10 = 60$ .*

**How likely are you to recommend [brand] to a friend or colleague?**

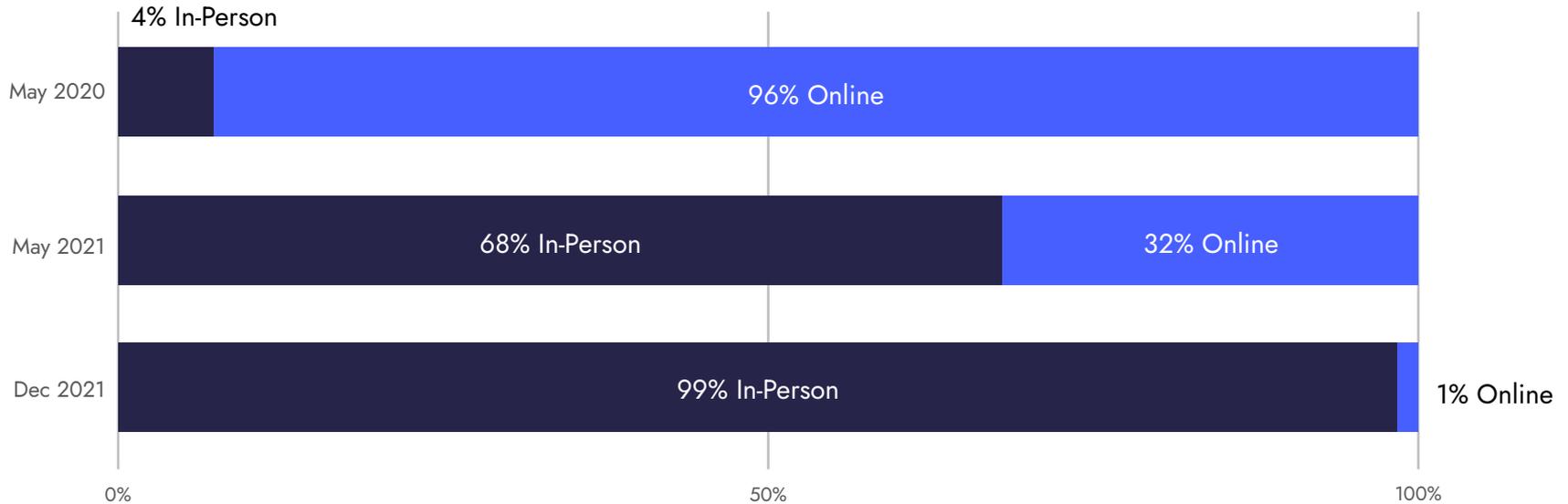


# Operational Insights:

Demand is surging for  
in-person experiences.

# The distribution of **online** and **in-person** attendees has completely flipped from 2020 to 2021.

% of Consumers attending **In-Person** vs. **Online** Experiences



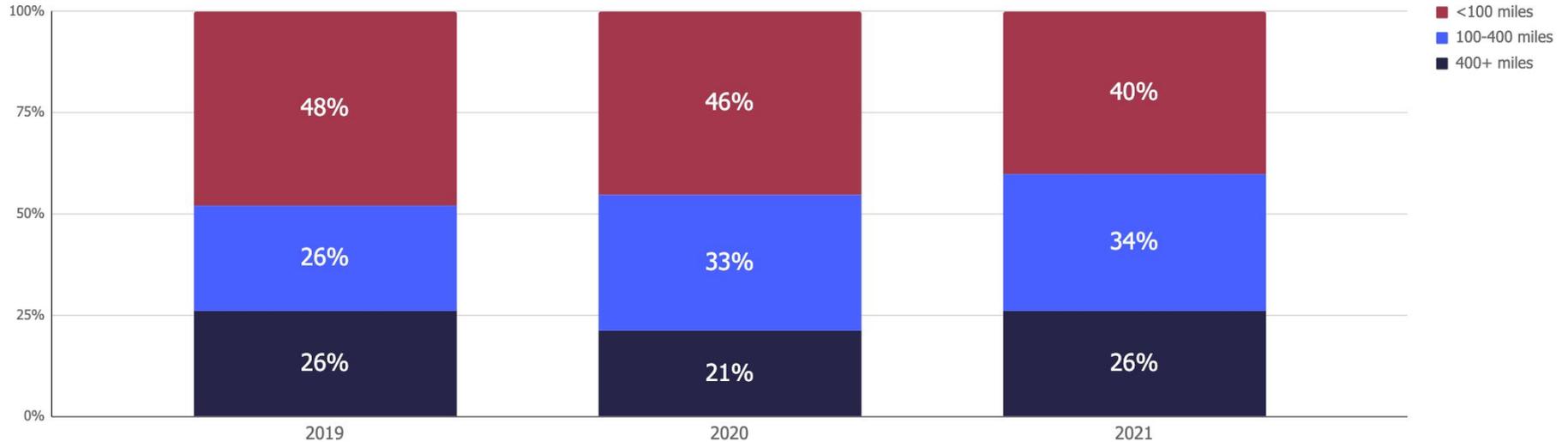
# Online experiences are seeing diminishing returns due to 'Zoom Fatigue.'

Average NPS for **In-Person** vs. **Online** experiences



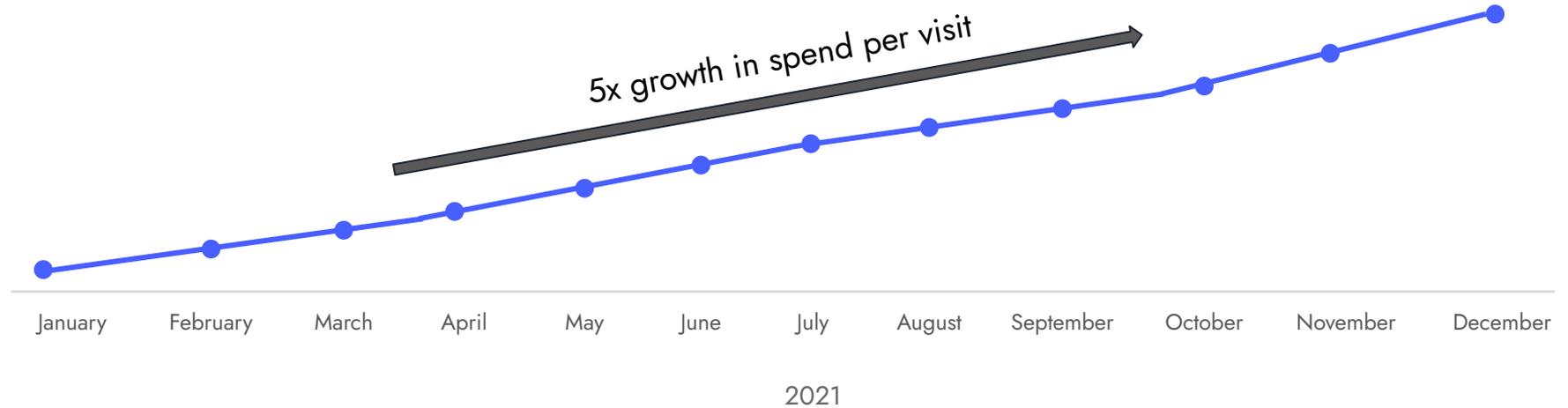
# Compared to prior years, guests were more willing to travel longer distances to attend experiences.

Breakdown of Distance Guests Traveled per Year



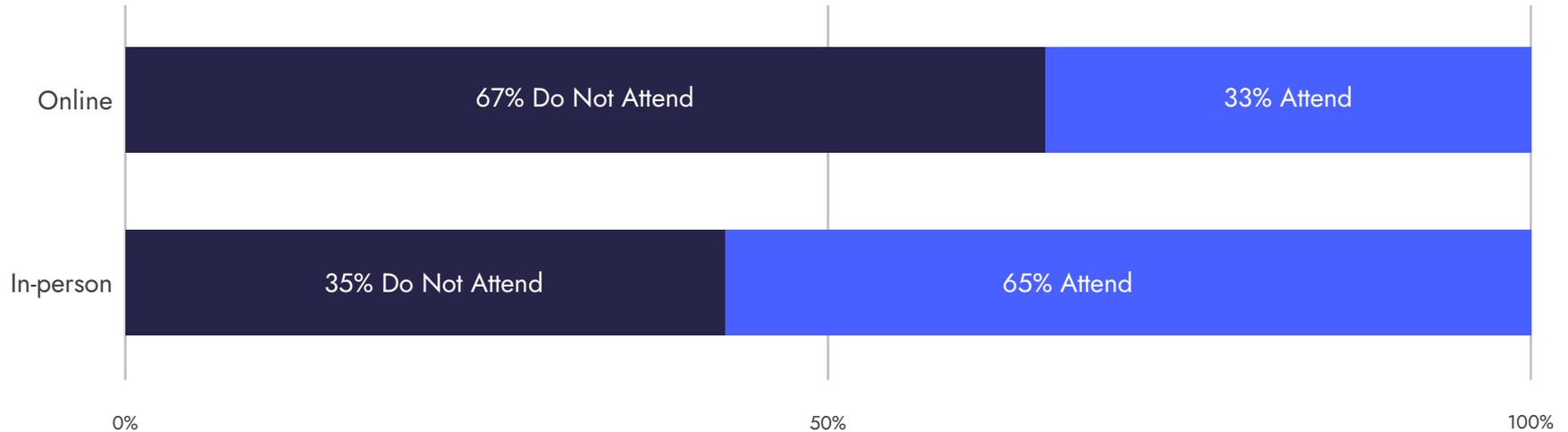
# Spend per visit continues to increase. Consumers spent >5x in Dec vs. Jan 2021.

Average **Spend per Visit** MoM YTD



# Zoom fatigue is real: Only 1 in 3 consumers show up to online experiences.

% Guest Attendance Online vs. In-Person





## ANYROAD INSIGHT:

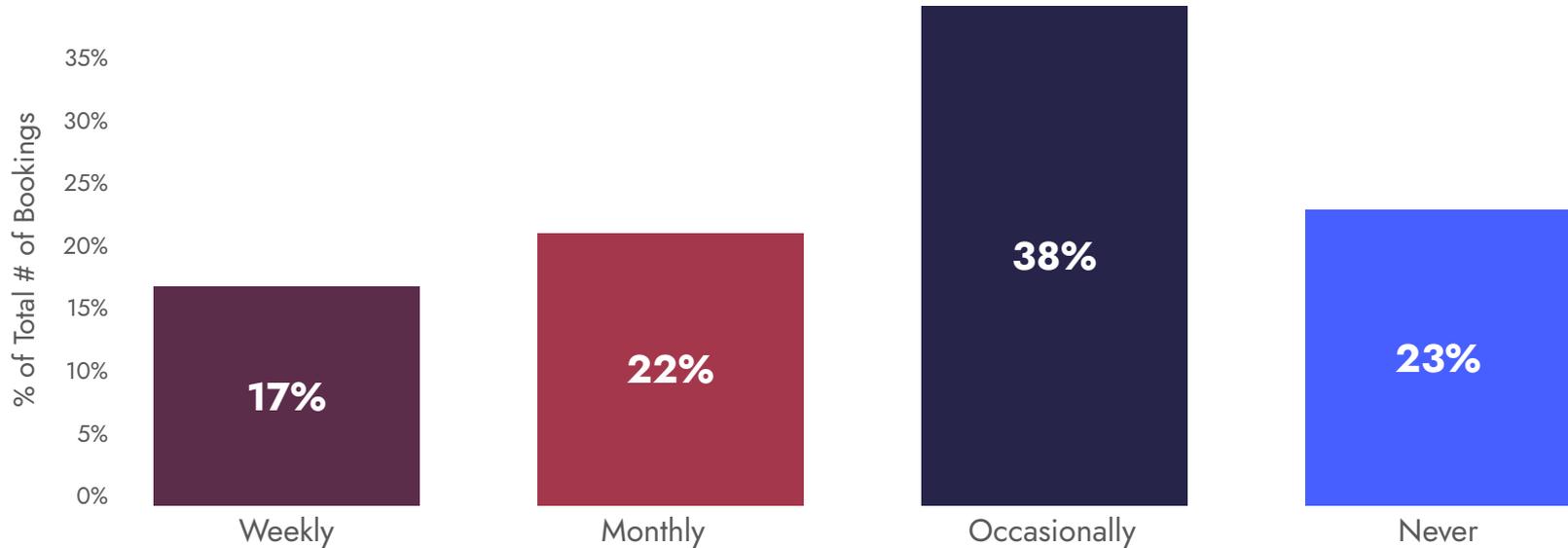
Did you know that Tuesdays have the highest average NPS of **83**, while Fridays have the lowest average NPS of **74**?

# **Audience Insights:**

Brand Homes create  
brand champions.

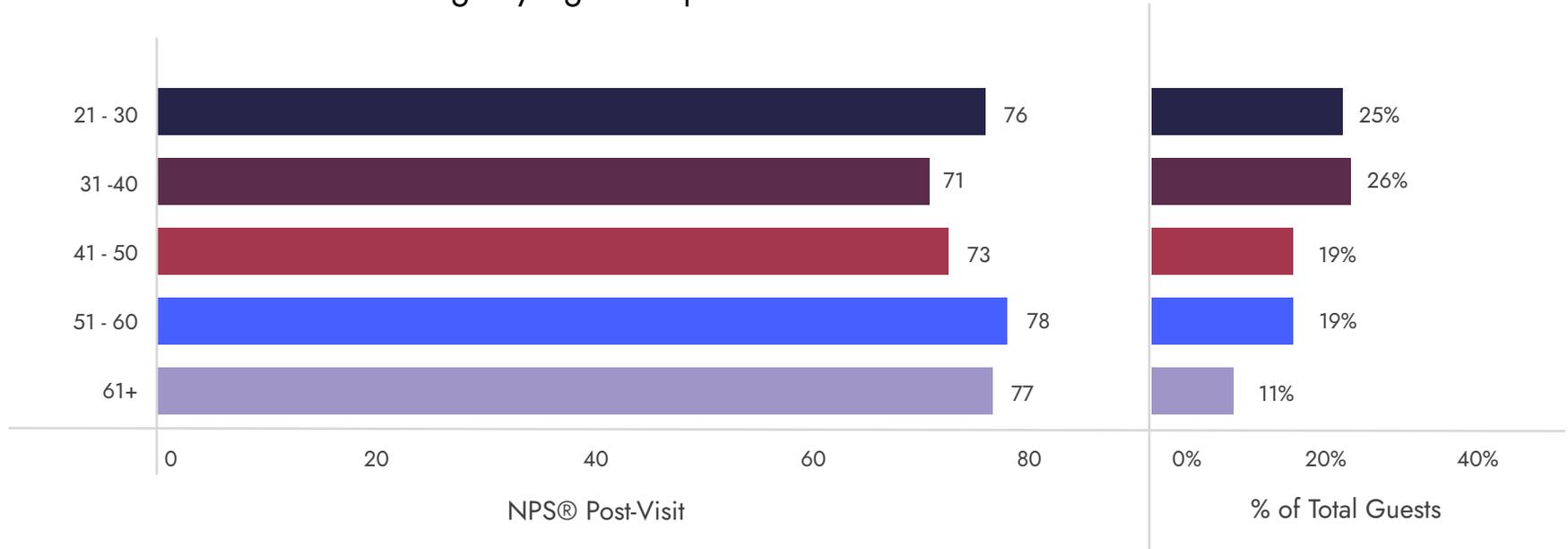
**Most visitors are not frequent consumers.**

**= Opportunity to create new brand champions and increase LTV.**



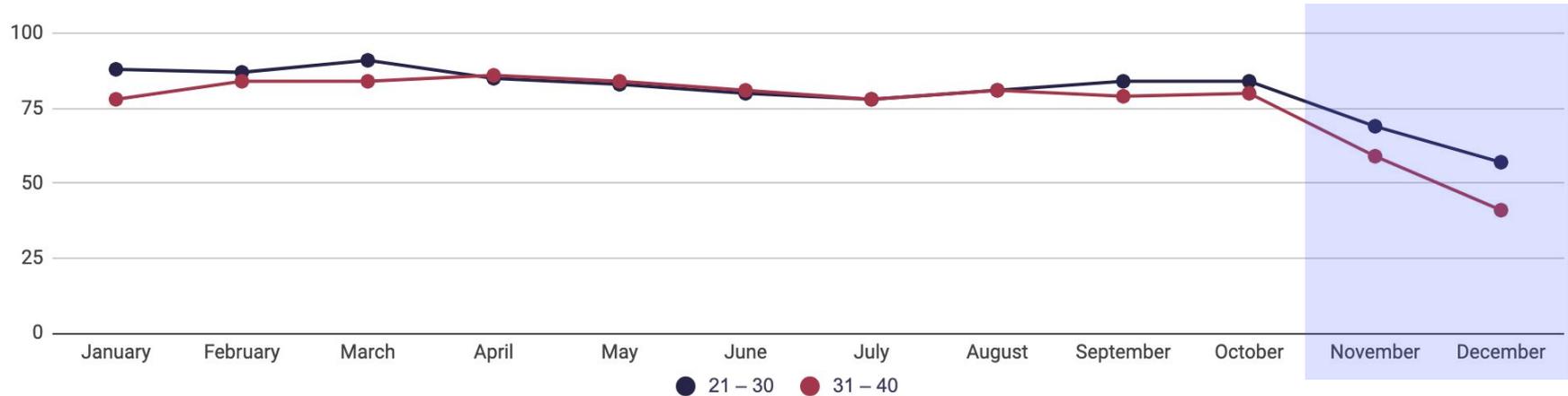
# 21-30 year olds and 31-40 year olds comprise the two groups that visit Brand Homes most frequently.

**2021:** NPS and Guest Percentage by Age Group



# Due to staffing and capacity planning challenges, NPS dropped significantly in November and December.

NPS by Age Group by Month





## **ANYROAD INSIGHT:**

31-40 year olds are **10%** more likely to make repeat purchases than the 21-30 year olds.

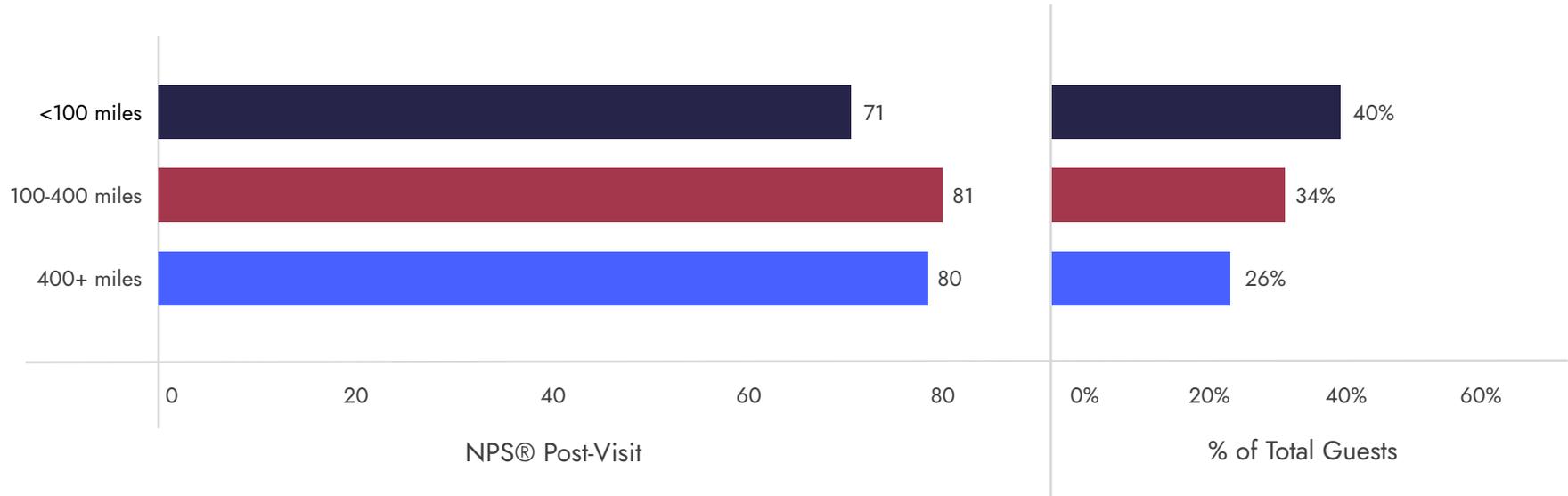
## 'Tourists' and out-of-town visitors spend 10% more per visit than local visitors.

Revenue per Guest by Distance Traveled

	2019	2020	2021
<100 miles	\$14	\$15	\$18
100-400 miles	\$13	\$14	\$19
400+ miles	\$15	\$16	\$20

# 'Tourists' and out-of-town visitors tend to exhibit a higher NPS.

## 2021: NPS and Guest Percentage by Distance



**Brand Homes must attract out-of-town visitors to increase revenue per guest and NPS.**

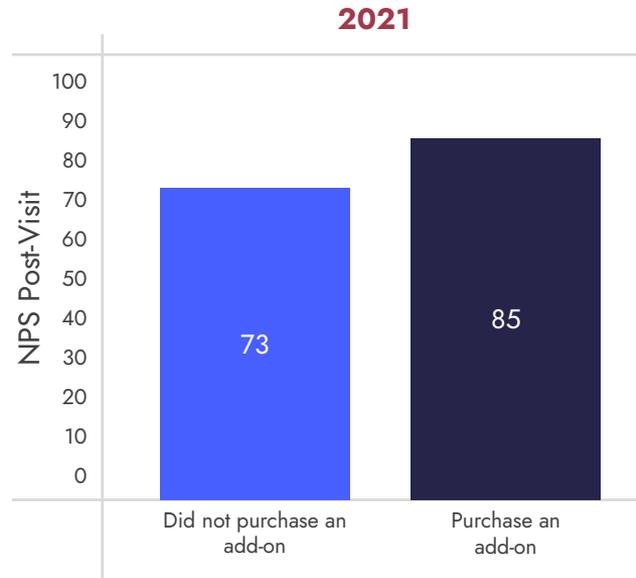


**AnyRoad tip:**

Identify where the biggest spenders are coming from and launch ad campaigns that focus on these groups.

# Upselling guests with personalized 'add-ons' results in higher NPS.

NPS by Add-On Purchase Behavior



# 31-40 year olds tend to care more about learning the history behind the brand and how the drinks are made.

## Top 3 tips to attract this age group:



Provide structured training for staff to deliver accurate information.



Include more information about the history of the brand and fermentation process to the content programs.



Provide ample time for the audience to enjoy the drinks and ask questions.

# 21-30 year olds tend to care more about affordability and value of the experience.

## Top 2 tips to attract this age group:



Provide more entry-level experiences with standard drinks and a more casual atmosphere.



Leverage lightning deals and bundle packages to entice the younger audience.

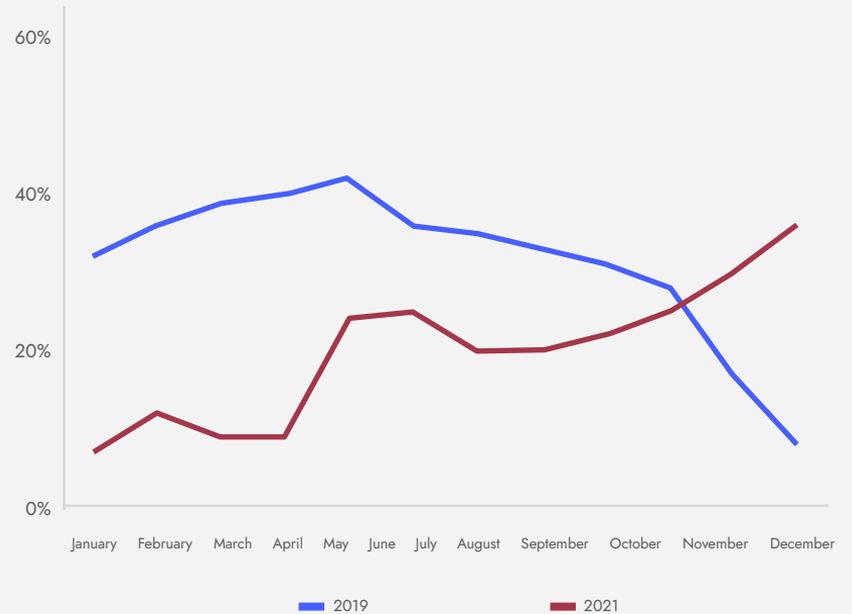
# Capacity Utilization Insights

Forecasting demand  
requires art and science.

**April and May** tend to see the highest capacity utilization rates as guests show more willingness to travel once spring hits.

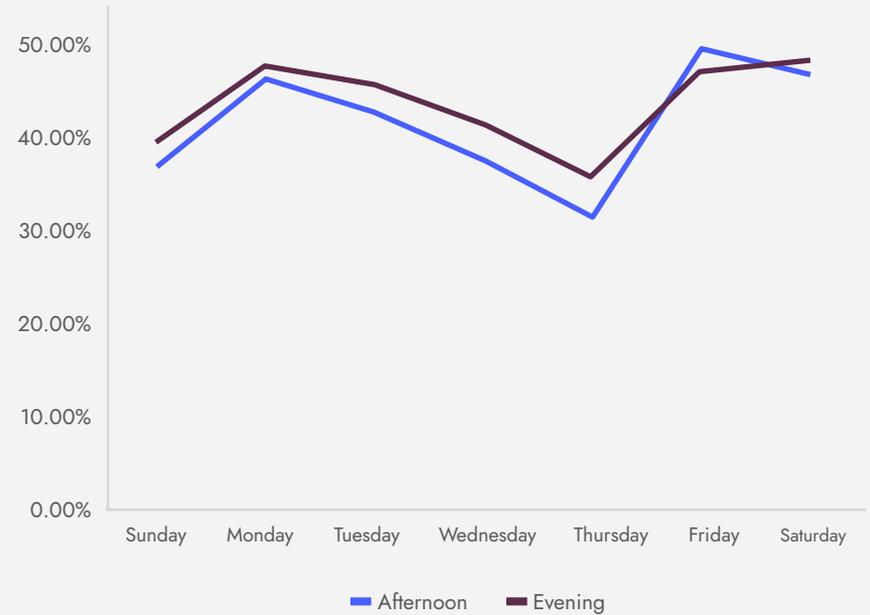
**Proper forecasting and staffing strategies should be finalized in the slower, winter season to effectively capitalize on the peak season activity.**

**Utilization Percentage by Month**



**Fridays and Saturdays tend to be the more popular days, while Thursday is the least popular day to attend an experience.**

## Average Capacity Utilization



**As the demand for in-person experiences surpasses pre-COVID levels, brands will need reliable solutions to better forecast capacity utilization.**



**AnyRoad tip:**  
use the Capacity Utilization chart to better understand traffic patterns and promote in advance for the less frequently booked experiences.



## **AnyRoad Insight:**

did you know that the average tour guide rating was a  
**4.89 out of 5?**

# Takeaways

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01

Ensure you are ready for busy season in May + June.

02

Offer personalized 'add-ons' to increase guest NPS and revenue per visit.

03

Dive deep into guest feedback to understand what's working and what's not.

