

DRIVING VALUE FROM PASSPORT-STYLE EVENTS



A Case Study







INTRODUCTION



- Passport to Dry Creek Valley the original and gold-standard of Passportstyle events is now in its 31st year.
 - We've put together a panel to talk about how this event continues to drive awareness for the region, sales for the wineries and exceptional experiences for the consumer.







- Ann Petersen, Executive Director Winegrowers of Dry Creek Valley
- Debra Mathy, Proprietor, Dutcher Crossing Winery
- Robert Conard, Director DTC, Dry Creek Vineyard
- Robert Rainwater, Director of Sales and Marketing, Amista Vineyards

ABOUT PASSPORT



- History
 - 31 years! Founded by Dave Stare, based on sailing event
 - Range of 12 to 50 wineries
 - High of 6500 consumers
- Demographics/Geographics
- Event Marketing
- Association Touchpoints with Participating Wineries

PURCHASER GEOGRAPHY

PURCHASER REGIONAL GEOGRAPHY 80% 70% 67% 65% 60% 50% 49% 50% 40% 30% 20% 10% 1%1%1% California Sonoma Bay Area Southern Other Texas Dallas Houston County CaliforniaCalifornia 2018 2017 2016

PROMOTIONAL PARTNERS

- PRESENTING SPONSOR:
 - The Press / SF Chronicle
 - Membership Giveaway 20x Sunday passes
 - Internal/Executive Passes 10x 2-Day passes
 - Vintage Soiree 10x Tickets
 - Activation Site at Timber Crest
- PRE-SALE SPONSOR:
 - AmaWaterways
- VINEYARD TOUR SPONSOR:
 - American AgCredit
 - Provided Branded Water Bottles for Vineyard Tours
- FLORAL SPONSOR:
 - American Grown Flowers
 - Florals donated by Venn Floral for Vintage Soiree





PROMOTIONAL PARTNERS

- LODGING SPONSOR:
 - The Duchamp Healdsburg
 - Host for The Vintage Soiree
 - Received 30x Vintage Soiree Comp Tickets
 - Lodging Package & Promotion
 - Opt-In Emails for Soiree Attendees
- IN-KIND MEDIA SPONSORS:
 - Sonoma Media Investments
 - Wine Country Media
- CASH SPONSORS:
 - Sonoma County Tourism
 - The County of Sonoma





















PASSPORT MEDIA

DIGITAL

- Sojern
- VIA E-Newsletter
- SF Gate & SF Chronicle Promo
- Sonoma Media Investments
- Sonoma.com
- D-Magazine

PRINT

- Sonoma Magazine
- SF Chronicle
- Via AAA Magazine

RADIO

- KSRO Off the Vine
- Wine Country Radio

SOCIAL MEDIA

- Facebook Ticket Giveaway
- Facebook Ad Campaign

EMAIL

- Consumer (14k+)
- Purchaser (2.5k+)
- Texas (1k)

PARTNER MEDIA

- Sonoma County Tourism
- Sonoma County Vintners
- Visit Santa Rosa
- ZAP

\$60 – 80K ANNUALLY

CHALLENGES



Wineries:

- Don't get to experience event and incorporate best practices
- Don't share knowledge with each other

Organizer:

- Motivating winery participation in sales process
- Organizing/Prioritizing feedback/challenges
- Understanding consumer experience
- Solution: Communication with your partners 358 days/year



- Details of program
 - 142 shoppers deployed
 - Each winery visited min 3x during the weekend
- Evaluated on:
 - First Impression
 - Saturday + Sunday check in (ease, can find it)
 - Customer Service
 - Food + Entertainment
 - Sales
 - Sales Materials
 - Overall Score



- These should be a "given"
 - restrooms clean
 - parking clear
 - felt welcomed+ check in easy to find
 - Staff knowledgeable about the wines
 - Food was plentiful
 - Festive atmosphere, music was the key element mentioned
 - Staff cheerful, not flustered



- What they love:
 - extra pours
 - being greeted by the owner
 - Getting the attention and the description of wines by the staff, *even if *and especially when * it is busy
 - Upscale porta-potties
 - Wine next to food stations, ingredients listed for food
 - Handouts
 - If there is a theme invest 110%
 - Idyllic location (warehouse challenges)



- What needs to be done better ASK FOR THE SALE
 - 64% of respondents said no one offered to sell them wine
 - No one was mentioned as an exceptional sales person
 - 75% said no one asked them to join the wine club
 - First impressions in the parking lot
 - Do NOT let staff use guest bathrooms and have guests use porta-potties
 - Do not pour wines they can't buy



- Results in action:
 - Results provided at mandatory wrap-up meeting
 - Provided each winery their own, individual report with how they ranked overall
 - provided wineries proprietor/owner ribbons to wear for visibility
 - Takeaway order forms
 - Clear path to sales

WINERY TOUCHPOINTS



- Sign up for following year immediately after event
- Mandatory supply pickup meeting
- Mandatory wrap-up meeting, with small group break outs to distill takeaways for next event
- Strong committee making real decisions!
- Invested in pre-sale
- Weekly dedicated newsletters
- Frequent sales reports



Debra Mathy, Proprietor



Consideration for Passport Style Events



Why engage?

Number One:

Can we stay on Brand Point?

Once on brand prioritize key initiatives to support event:

- Key foundational initiatives at least two must be achievable to move forward with event
 - 1. Build Brand Recognition
 - 2. Sell Wine
 - 3. Support the Association





Review and Understand Scope of Event

Develop a Standard Operating Procedure to Support Event



People

How Many What Skill Sets?

Training gaps? ⇒
develop a strategy

Staff Scheduling



Process

Organization will make or break you Re-evaluate process flow

- Identify what's different, create unique SOP
 - Over communicate
 - Create "cheat sheets" for staff

Product

Real experience is product

- Strive to deliver an exceptional experience they won't forget
- Considerations include:
 - 1. Showcase wine & offerings
 - 2. Ambience that is relevant
 - 3. Exceptional food and wine pairings
 - 4. Does the entry and exit flow well



Be in the Moment

Create unique memorable experience



365-day year event

- Clear goals
- Motivate throughout year

Communication

Before

- **Announce participation**
- Don't rely on the association to market to your customers
- How does your communication beyond wine club members

During

- Easily understandable signage
- The wines and point of sale should be in multiple locations
- Effective professional signage

After

- Follow-up customer appreciation
- Recognize your staff
- Follow-up with the association

Critical consideration throughout

- How do you make new customers feel welcomed and valued
- Ensure members feel special always critical to your success as a winery





Continuous Process Improvement

Always innovating

Review & Dissect

Feedback

- Customers
- Secret Shoppers
- Poll your own people

Wine & Non-Wine Sales Data

- Analyze sales from existing wine club members, new customers
- Analyze new wine club memberships, merchandise sales, trends?
- Did you meet your sales goals?

Critical thinking – what worked well and what did not

- Food and wine pairing
- Did you meet your concise goals
- Did every element meet our standards for our brand









End Game

- ≥ \$125,000.00
- ≥ 70 wine club memberships
- ≥ \$40,000 extra revenue post event/annually
- ≥ 3500 people through doors in 2 days









You Get Out What you Put In







Dry Creek Vineyard





Events 101



- Take notes during your event
- Have a recap meeting with your entire team, after the event
- File those notes where they are easily accessible
- Review at the next pre-event meeting





A Beginning, A Middle And An End





The Greeting



Have a plan for:

- Parking
- Problem Solvers
- · Check-In
- Communication
- Greeting



The Show





Wise Words



"People buy warm benefits, before they buy hard facts.

They don't buy things and they don't buy information –

they buy wants, needs and dreams."

- Lynda R. Paulson, Romancing the Grape



The Close







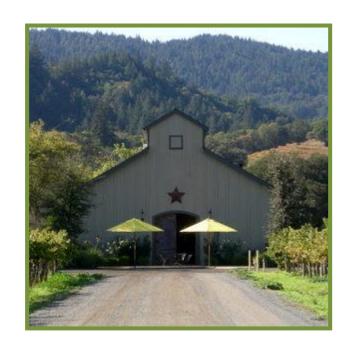
THANK YOU!



Robert Rainwater

Director of Sales & Marketing







Be clear about your Objectives and Goals





Create a Budget

- Expenses
- Sales
- Identify your KPIs
- Compare





Create Specials

- Member Only
- General Public





Event

- Clear Flow
- Special Pour at Bar / POS
- Special Vendors





Engage Loyal Members

- Brunch
- Specials
- Incentives





Add-on Activities

Vineyard Tour

- Engagement
- Additional Sales
- New Club Memberships





Marketing

- Social Media / Email
- Wine & Food Pairing
- Engagement





Metrics (2017 - 2019)

- 26% decrease in visitors
- 15% increase in # Orders
- 36% increase in Order Conversion
- 43% increase in Case Sales
- 48% increase in Wine Clubs





Conclusion

- Objectives & Goals
- Budget
- Specials
- Event
- Engage Loyal Members
- Add-on Activities
- Marketing





KEY TAKEAWAYS:

- BE INVESTED
- ASK FOR THE SALE
- PARTICIPATE WITH THE EVENT ORGANIZERS
- ADD ON EVENTS through the organizers or on your own
- Hospitality Rules!
- Change the ticket strategy less is more is better for everyone

