

# Ultimate Guide to Marketing Automation for Venues



**BlueGator**



## Welcome.

### Technology should be the solution. Not the Problem.

As a marketer, you know who your guests are, you know what messages motivate them to buy, and you know when to send them, but you're stuck – you can't segment your target audience without spending tons of time pulling lists, generating reports, running SQL queries, de-duping, etc. You've seen the ads and watched all the webinars about amazing marketing tools where you can drag and click your way to marketing automation Shangri-la. The problem is that feels like a pipe dream because your data is all over the place.

It might feel like you'll never get there, but there is hope. With the right guidance and tools, basic personalization and segmentation are within reach, no matter what size of venue you operate.

This guide provides you with actionable steps you can take to start automating your marketing – one step, one segment, one campaign at a time. Over time, you'll be able to build and deliver a robust upgrade funnel. We will show you how.

- TJ

**TJ CHRISTENSEN**

Founding Partner & CEO  
of BlueGator





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# THE FUNDAMENTALS

Marketing automation is as much about connected and accurate data, as it is about amazing omni-channel journeys that will bring your venues' guest experience game to another level.

You can't connect with your guests until you know how and when they are engaging with your venue. To get started, it's important to make sure your organization has the fundamentals in place first.

## 1. Connect Data

For venues, this starts with connecting your ticketing system to a CRM. This gives you access to data like:

- |                     |                         |                          |
|---------------------|-------------------------|--------------------------|
| • <b>Guest Name</b> | • <b>Address</b>        | • <b>Price</b>           |
| • <b>Email</b>      | • <b>Ticket Type(s)</b> | • <b>Lifetime visits</b> |
| • <b>Phone</b>      | • <b>Visit Date</b>     | • <b>Lifetime value</b>  |

By integrating this data with your CRM, you can now act on it in very specific ways, which we will outline later in this guide.





## 2. Segment

Now that your data is in a CRM, you can now segment your guests into different personas such as:

- **First Time Visitor**
- **Repeat Visitor**
- **Passholder/Member**
- **Donor**
- **Family**
- **Drive-to-market**
- **Outer Market**
- **Etc.**

If your data doesn't let you segment to this level, don't worry. Do the best you can, even simple segmentation can make a huge impact on your sales and marketing efforts. However, the deeper your data, the more complex and impactful your segmentation can become.

## 3. Content

It's time to get creative! Start thinking about your segments and how your content can be designed to speak to each segment to make the message feel personal and relevant. More on how to get started on this later in the guide.



# ENGAGEMENT METHODOLOGY

Recency. Frequency. Duration. Spend.

Over the last decade, we have helped some of the world's largest entertainment venues deploy commerce and guest experience technology.

The problem is it's not just the big guys that want and need to maximize the impact of digital engagement – it's every attraction of every size. Every venue sees the opportunity, but frankly many don't know where to start. It feels like you have to boil the ocean to make any meaningful progress, so you're simply left paralyzed.

Our framework helps reduce fear and spark action. It's based on RFM (Recency, Frequency, Monetary) – a marketing analysis tool that many retailers use but lends itself quite well to venues with a slight tweak.

We call it **RFDS**:

## RECENCY

PROVIDE GUESTS A  
REASON TO BOOK NOW

## FREQUENCY

DRIVE RETURN  
VISITATION

## DURATION

INCREASE THE  
LENGTH OF STAY

## SPEND

SPEND MORE  
PER VISIT



## Recency. Frequency. Duration. Spend. (continued)

By using a framework like this, we can build actionable programs/tactics that align with the venue's core priorities.

For the purposes of this article, we're going to approach RFDS from a one-size-fits-all guest segmentation perspective. That said, the more work you do setting a solid foundation around making data accessible for marketing the closer you'll get to the gold standard of Disney level personalization.

Let's dive a little deeper.

### 1. Recency

Our goal with Recency is to build trust with the guest and move them through a simple yet effective series that brings the guest into the brand, educates them on all the venue has to offer, and then provides them with a clear offer to book now.

#### **WELCOME**

When someone connects with your venue for the first time, whether that be a new guest or website visitor you'll want to send them an email immediately to both confirm they've joined your list and begin fostering a long-term relationship with the guest.



What should you include in a welcome email? Here are some tips:

- **Send immediately after they enter your database.**
- **Introduce your brand.**
- **Version the email by source (website, ticketing system, etc.).**

It's important to set the tone and expectations, let them know how often they'll be receiving emails from you and how to change their preferences. This is also a great opportunity to prompt them to follow your social media accounts. The key is to bring them into your brand, not to immediately start selling them or treating them transactionally.

## **ENTICE**

A few days after receiving a welcome email reach out and send them a few reasons why they should consider visiting again, or if already ticketed, let them know how to upgrade or enhance their experience onsite. Ideas to entice your guests might include:

- **Add-ons**
- **Top 5 Must See Attractions/Exhibits**
- **What's New**
- **Seasonal Events**
- **VIP/Backstage Experiences**
- **Family Activities**
- **Group/Event Opportunities**

The more personalized you can make this email, the more effective it will be. You can version based on segment, what they clicked on in the welcome message, if they've visited before, etc.





## ACTION

Now that we've welcomed our guests and we've enticed them, it's now time to create a sense of urgency around getting them to book now. Depending on the season or even the segment you might want to offer an incentive to book now. For the holidays, perhaps each order includes two vouchers for hot cocoa, a low-cost item that's sure to drive incremental F&B spend.





## 2. Frequency

Our goal with Frequency is to drive repeat and return visitation. To measure this accurately, you'll need to track when someone has in fact visited your venue. Then you can categorize them into a segment and tailor appropriate offers specific to their guest type. The more intelligence you have about a guest's behavior onsite, the deeper you can personalize each message to increase the likelihood they'll move up your value chain.

### DAY GUESTS

Whether it's a first-time visitor or repeat visitor, automating communication post-visit is incredibly valuable. Here are a few ways to drive Frequency for day guests:

- **Surveys:** Measuring guest satisfaction and NPS can help you understand areas of strengths and weaknesses of your venue, plus measure how loyal your guests are.
- **Upgrade Offers:** Automating return offers or upgrades to a membership/season pass are a great way to entice guests back to the venue soon.
- **Seasonal Events/Promotions:** Additionally, guests who have visited the venue in the past should receive ongoing offers and updates around season promotions and events to help drive return visitation.

### MEMBERS/PASSHOLDERS

Once someone becomes a member/passholder don't stop there. It's important that you design an email cadence around reminding them of the value of the membership. Maybe they get special access to new exhibits, vouchers for free meals, or 10% retail items. These are great reasons to engage guests throughout the year to keep them coming back again and again.



At the end of the year reinforce the value they received with an elegant summary of visits and experiences they took advantage of as a member/passholder.

We emphasize tracking visitation. Insight about the quantity of visits is invaluable when customizing communication. For instance, to re-engage guests whose visitation has fallen off, you can develop a journey that listens for guests that haven't visited in X months, and provide them with a special offer to return – reinforcing the value of their membership.

### 3. Duration

The more a guest experiences at a venue, the higher the likelihood of repeat visitation. The longer a guest stays, the more likely they are to spend more on ancillary items like food & beverage or retail. More importantly, the longer they stay and the more they experience, the more they'll feel like they've received great value for the price of admission.

Admittedly the hardest to execute, leveraging marketing automation to help guests have a better day while in park and stay longer we need to have a few things in place:



## WHO

We want to know who is in the venue, members, day guests, groups, etc.

## WHERE

Where are guests, can we leverage automation to 'move' guests to less crowded parts of the venue, or encourage them to take advantage of underutilized experiences within the venue.

## WHEN

When is messaging more relevant when they first enter the venue, before a meal period, etc.

## HOW

How are we going to reach these guests. Email is great but not effective when visiting a venue. Is there a mobile app for push notifications? Is SMS/Chat available?

Example messages might include:

Don't miss the Wild Birds event at 2PM.

Don't leave hungry. Did you know you can pre-order your food here:  
[www.yourvenue.com/food](http://www.yourvenue.com/food)

Need a break? Your kids will love the dinosaur playground in the upper park!





## 4. Spend

### CONFIRMATIONS

Transactional emails can be an incredible opportunity to build anticipation and unlock additional revenue by prompting guests to maximize their visit by purchasing things like meals, rides, or VIP experiences ahead of time. Besides the commitment to visiting, when guests take care of ancillary costs like parking and dining head of their visit, they have more available to spend on the day of their actual visit.

### PRE-ARRIVAL

The time between booking and arrival can be a golden opportunity to make sure guests are aware of everything they need to have fantastic time at your venue. Not only do you want to prepare your guest for what they need to know the day of arrival, like where to park, first timer tips, or what might be happening on that day, it's also an opportune time to reinforce add-on experiences, meals, or rides. Take advantage of the time to explain complicated offerings like virtual queuing or educational experiences that require more guest education.



## **DAY OF VISIT**

Once you know your guest is in the venue, take advantage of the opportunity to provide them with supplemental offers via SMS or mobile app messaging. You don't want to annoy guests while they are enjoying the venue, but one or two timely messages can really enhance their onsite experience. For example, if you have meal pre-ordering available, you should absolutely be marketing that in real-time to guests. Even if you don't have pre-ordering available a message sent at 11:30am informing your guests about food options is a great way to remind guests and extend the duration of their visit.

## **BOUNCE BACK**

Once a guest has visited the venue, it's time to entice them to come back to visit again. This can take shape of an upgrade, an exclusive discount they need to take action on in X days, or simply keeping them updated on upcoming events they may be interested in.





# CUSTOMER LOYALTY

## 1. Recognition

Recognizing loyal visitors can be a great way to surprise and delight your guests. By providing guests recognition and incentive for milestones like the number of visits in a year, or number of consecutive years as a passholder, you can be sure to continue to foster good will and drive additional visits to your venue.

## 2. Survey

Automating and integrating Survey data into your CRM, make tracking, reviewing and operationalizing feedback scalable across the entire team. Below are a few key tips for survey automation:

- Send a survey to every guest the day after the visit.
- If the survey is overwhelmingly positive, automate a follow-up email with a promo code to book again and prompt them to provide a review on a site like google or TripAdvisor.
- If the survey is negative, automate a task for someone from the operations team to follow up and resolve the issue.
- Avoid feedback fatigue by automatically opting guests out of receiving a survey if they've already completed one in the last X months.



# DONOR RELATIONS

If you're a nonprofit venue, then you know the importance of growing and nurturing your donor base, but it can get complicated fast. Some donors visit regularly, some rarely visit. Memberships can get complicated too. Your development department might consider the primary passholder for a family membership a donor, but not a single member. On top of all that you might have separate categories for your VIP donor levels. So how do you segment your audience properly when marketing data, visitor data, and donor data are all siloed off in separate systems, and the groups don't even work together regularly?

The answer: gather that data together to create a unified view of all your guests, memberships, and donors. It may sound like a high bar to reach, but it can be done! And better yet, when you do bring the data together, you're able to provide additional value across the organization -not just trying to sell the ROI of a clean-data.

By leveraging Salesforce's highly robust fundraising platform called Nonprofit Success Pack (NPSP) and integrating ticketing and visitation data you can finally see all your data in one place – marketing communications, ticketing purchases, visits, and donation history. From there the sky's the limit on what capabilities you can unlock across the organization, including the ever-important SMS to the leadership team when your biggest VIP walks into the front door.





# ROI JUSTIFICATION

## How to justify the investment in marketing automation:

Want to be the marketing hero you've always dreamed of being? You don't need a cape, but to get started you will need budget to put the right pieces in place. How can you justify that? Let's walk through the numbers.

### **HOW MUCH IS THE SOFTWARE TO RUN ALL THIS GOING TO COST?**

Depending on what technology you're using and the number of team members that will need to access the CRM, the cost can range significantly. Venues we work with that have attendance between 500,000 - 1,000,000+ in annual attendance typically spend between \$75 - 150K in software license fees.

### **WHAT ABOUT THE COSTS OF IMPLEMENTING THE SOFTWARE?**

We highly recommend using a partner to implement your sales and marketing technology – even if it isn't us. A partner who has worked with multiple venues can make sure you're following best practices as well as provide guidance on the best approaches to increase revenue and visitation. That said, you can typically bank on initial implementation fees being about 1.5 - 2X of your annual software spend.

We also recommend allocating budget after the initial implementation to work with a knowledgeable partner on an ongoing basis to continue refining your approach. Marketing automation is a journey more than a destination. As your data landscape and engagement approach evolve, you will want to take advantage of more sophisticated approaches. These fees can range from \$50K - 100K+ depending on the level of engagement required.



## GETTING POSITIVE ROI:

\$225K – 450K, are you kidding!?! It sounds like a lot, but let's look at the benefits on the revenue side before we give up all hope. Let's project that we could get 3% of day visitors to upgrade to a season pass or membership. Here is what that might look like:

## SAMPLE USE CASE:

TOTAL ATTENDANCE	1,000,000
PASSHOLDERS	15,000
AVG. # OF PASSHOLDER VISITS	3.5
# OF UNIQUE DAY GUESTS	947,500 [1M - (15,000 X 3.5)]
DAY GUESTS	947,500
CONVERSION THROUGH TARGETED ENGAGEMENT	3%
DAY GUEST TICKET ► MEMBER REVENUE UPLIFT	\$45
REVENUE GROWTH	\$1,279,125

**That simple automation could unlock almost \$1.3M in revenue every year!**

That's just the beginning! If you layer in all the advice in this guide, you'll be well on your way to delivering maximum value to your organization, and more importantly delighting your guests along the way!



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# JOURNEY USE CASES



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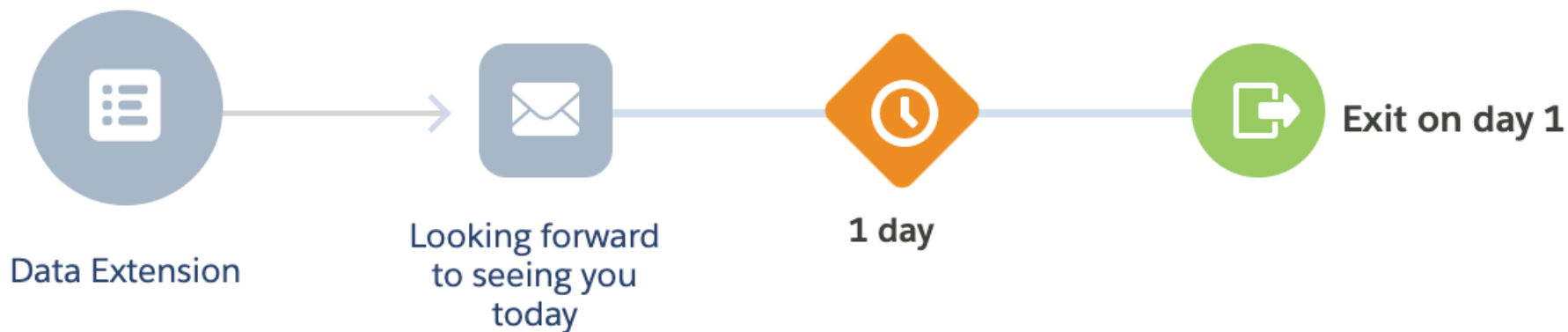




# GUEST EXPERIENCE

## Today's Arrivals

Sample Journey greeting guests the morning before their visit.





# GUEST EXPERIENCE

## Tickets Purchased

Sample Journey to illustrate how it is possible to segment communication based on guest visitation





# GUEST EXPERIENCE

## Dated Ticket: Pre/Post Visit Messaging

Sample Journey to illustrate how its possible to segment communication based on guest arrival date for dated tickets



**KEY:**

Automatically Enroll Contact in Email Campaigns

Automatically Enroll Contact in Ad Campaign via Ad Studio

Visitation/Dated Event Information from Salesforce



# MEMBERSHIP

## New Member Welcome Series

Sample Journey to illustrate how a venue can automate member communications and drive upgrades mid year.



**KEY:**

Membership Type information from Salesforce



Sample Journey to illustrate how a venue can provide surprise and delight moments to members based on their visitation behavior.



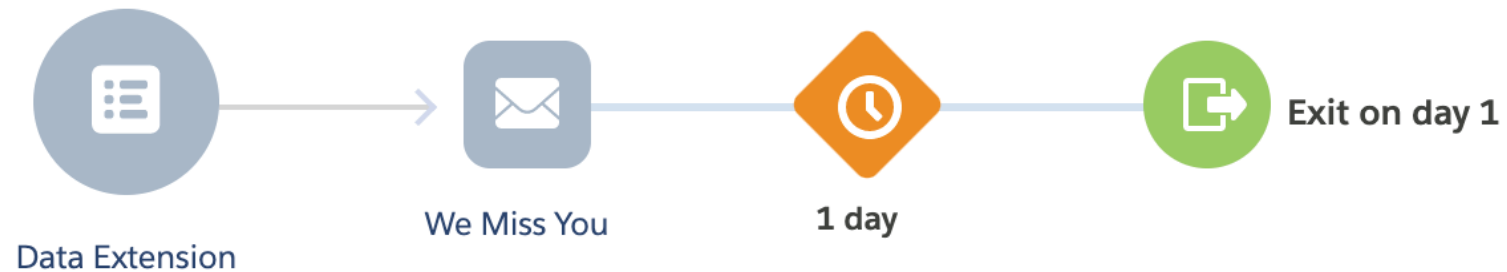




# MEMBERSHIP

## Recapture Inactive Members

Sample Journey to illustrate how a venue can prompt members who haven't visited in three months to come and see what's new.

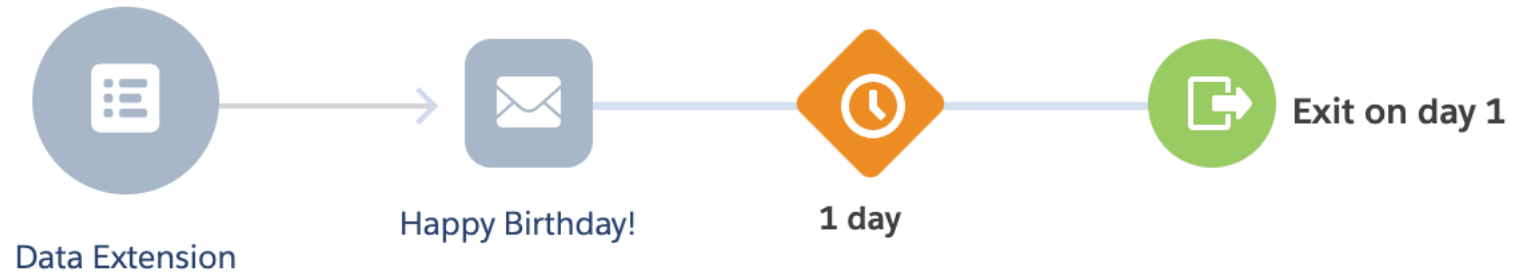




# MEMBERSHIP

## Remember Members Birthdays

Sample Journey to illustrate how to automate sending a member a “Happy Birthday” message.





# MEMBERSHIP

## Membership Expiring

Sample Journey to illustrate how to automate sending reminder emails about an expiring membership.





# DONORS

## New Donor Thank You

Sample Journey to illustrate how to automate sending thank you emails after a donation is received and automatically enroll the donor in a campaign.



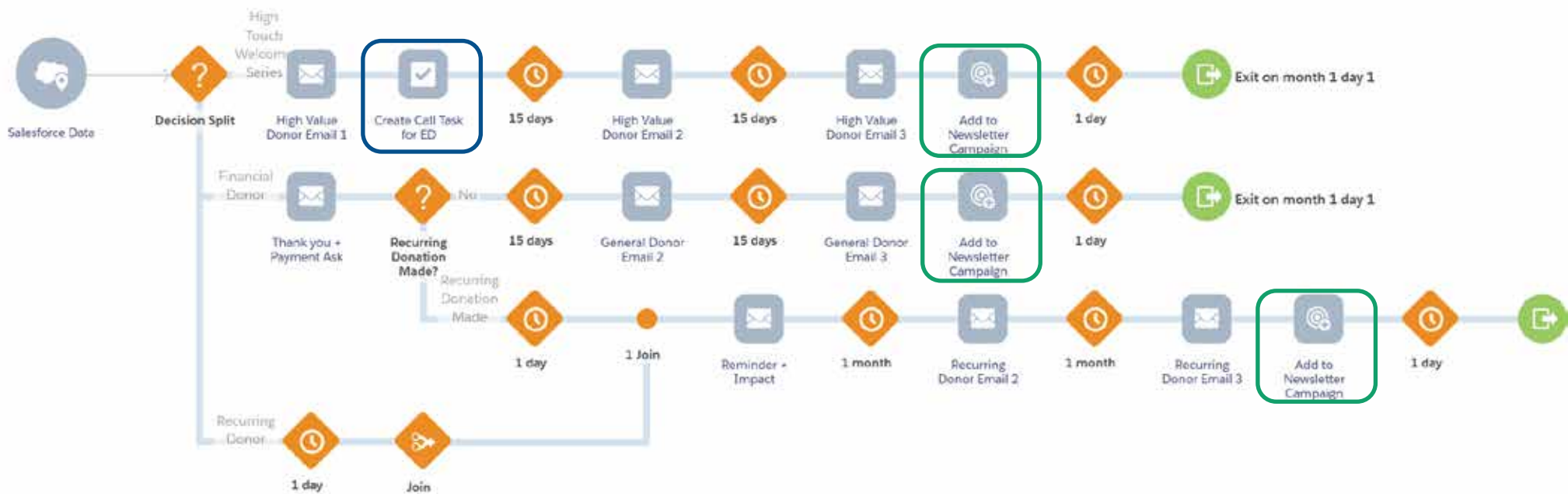
Automatically Enroll Contact in Ad Campaign via Ad Studio



# DONORS

## Sample Financial Donor Journey

Sample Journey to illustrate how it is possible to segment donor communication based on level of contribution.



**KEY:**

Automatically Enroll Contact in Email Campaigns

Create a Task from Marketing Cloud

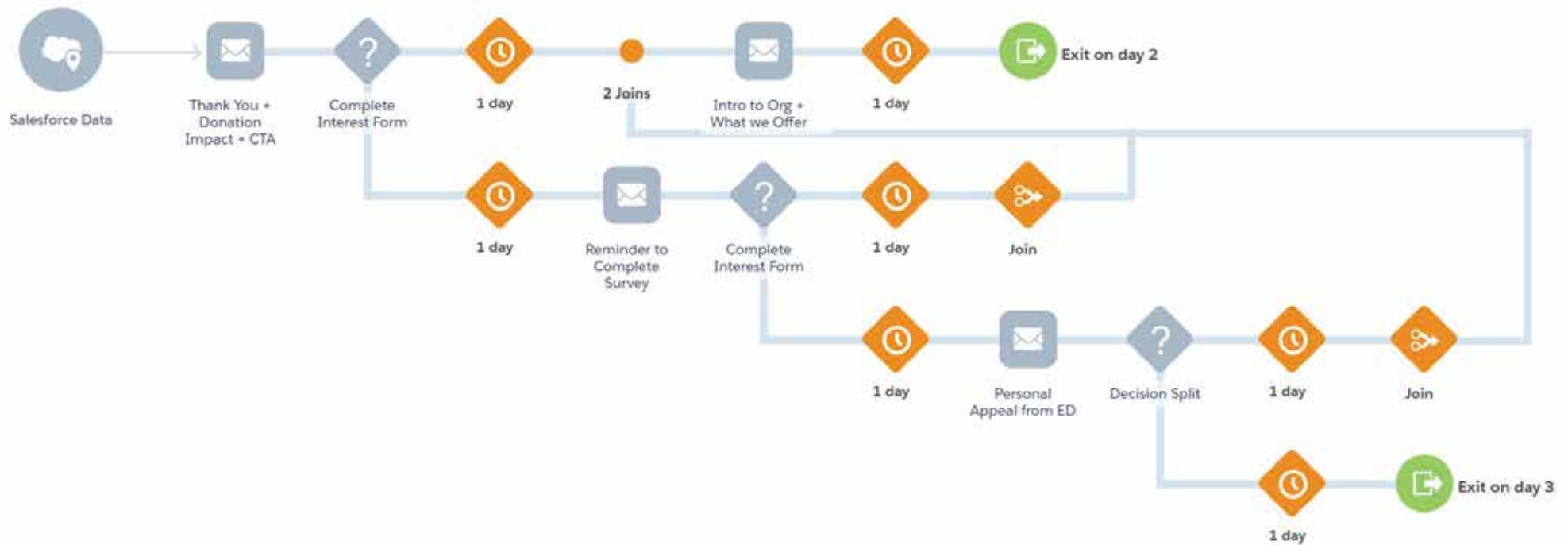




# DONORS

## Sample New Donor Journey

Sample Journey to illustrate how to solicit additional information/interest from a donor using automation.



# CONNECT WITH US

Scan the code to schedule a meeting with TJ and to learn more about how BlueGator can help you reach your audience and achieve amazing results.



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