BLUE SAIL►

VISITORS PLACES DESTINATIONS

FUTURE OF TOURISM ON SCILLY: PRODUCT IMPROVEMENT PLAN

TECHNICAL PAPER FOR ISLAND MARKETING

APRIL 2011

CONTENTS

1 BACKGROUND

ABOUT THE *FUTURE OF TOURISM ON SCILLY* STUDY

Between September 2010 and March 2011, Blue Sail carried out a study into the future of tourism on the Isles of Scilly, in consultation with local people. We were asked to advise on how tourism can continue to support the islands, the islands' economy and the islanders' quality of life.   We focused on how Scilly can stay competitive in the future, while retaining its unique character and special environment.

Our overall recommendations are summarised in two standalone documents that will be sufficient for most people's purposes: the **Blueprint Report** and the **Blueprint Action Plan**.

For those who need or want to go into our findings in more depth, there are also a number of detailed technical papers:

- ▶ Green Framework
- ▶ **Product Improvement Plan (this report)**
- ▶ Marketing Plan
- ▶ Tourism Organisation Report
- ▶ Research Summary

- ▶ Research Plan
- ▶ Storyboard
- ▶ Consultation Meetings Report
- ▶ Marketing Workshop Report

Technical papers are online at www.scilly.gov.uk/community/tourism

MARKET CONTEXT

Market conditions have become much tougher over the past decade. Visitor numbers to Scilly are dropping, with the steepest decline in day visits. The length of stay is shortening too.

Up to now, Scilly has depended on a very high level of returners. But the generation that became Scilly's 'loyal devotees' is ageing. The visitors who must replace them are much more widely travelled than previous generations. They have higher quality expectations. They are much harder to please. And the world is their oyster. So they are much less likely to be loyal – and Scilly will need to attract more first-time visitors than before.

Distance and cost mean most potential staying visitors view a break on Scilly as a holiday, rather than a short break. While domestic *short breaks* have grown consistently over the last decades, domestic *holidays* have been hard hit, first by the introduction of low-cost package holidays, and more recently by the advent of low-cost airlines.

These days – for the same price or less than a break on Scilly – people can get a holiday with guaranteed sunshine and exotic experiences plus high levels of hospitality and service.

Scilly may be exotic when compared to other places in the UK. But it is now competing – more than ever – with the likes of the Canaries, Ibiza, South of France, and even long-haul places such as the Caribbean.

2 PRODUCT IMPROVEMENT PLAN

ABOUT THIS PLAN

This Product Improvement Plan focuses on what needs to be done to improve the visitor experience to meet the needs of Scilly's visitors – now and in the future. It looks at the physical infrastructure and the service offer. Improvements to both are needed to ensure that the islands are continually renewing and improving the customer offer for existing visitors, reinforcing their loyalty and commitment to Scilly, and providing the kind of modern, consumer-focused product and service levels that can attract new markets.
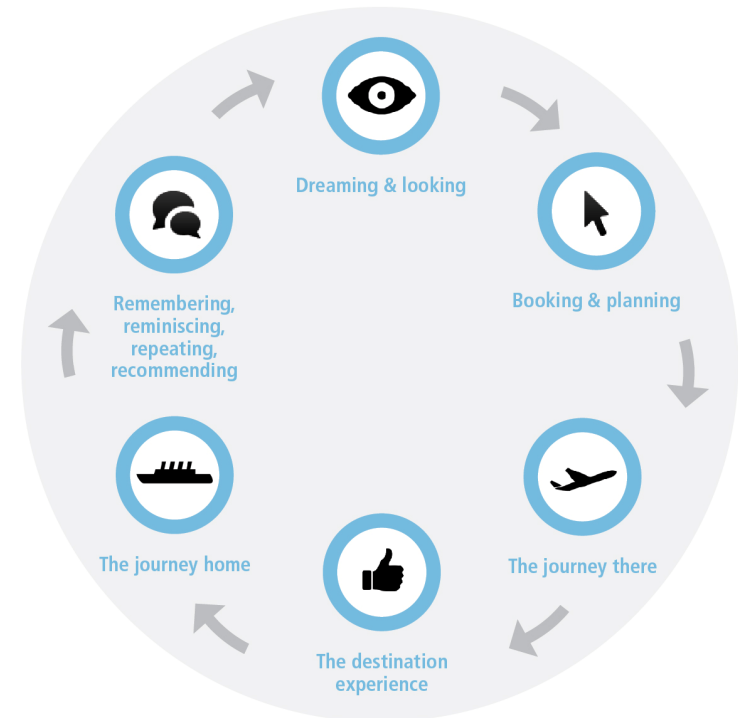
This Plan draws on the input from islanders to the wide consultation process, primary and secondary visitor research and one-to-one stakeholder interviews, as well as our own experiences and impressions as visitors to Scilly.

THE VISTOR JOURNEY

We have based the analysis of the current product and the areas for improvement on the 'Visitor Journey'. This is an analytical tool that looks at what visitors experience at each of 6 stages – from first dreaming about taking a trip, to eventually arriving home and reminiscing.   This is a circular process: if a destination satisfies the customer at all stages of the Visitor Journey, the result is repeat business and recommendations. This is especially true now that 'word of mouth' is so far-reaching, thanks to social media and consumer-reviews websites.

In Section 2 we identify areas for improvement under each stage of the Visitor Journey along with suggested courses of action.

We then bring these together in a table in Section 3 and highlight the key areas of improvement we consider essential for Scilly to deliver a contemporary visitor offer.

The Blueprint Action Plan sets out timetables and lead organisations that are best placed to deliver on the product improvements alongside the recommended marketing and organisational changes.

Stages 1 and 6 of the Visitor Journey – 'Dreaming and Looking' and 'Remembering, Reminiscing, Repeating and Recommending' – are predominately about marketing and communication. The meat of the product development issues are about the booking, travel and the destination experience itself.

THE MAIN ISSUES

The issues that have emerged consistently through customer and business consultation are:

▶ The difficulties associated with travel to and from the islands

▶ Variable levels of service in the accommodation and food sectors

▶ Seasonal opening, and the quantity and quality of the visitor offer out of season

▶ The quality and range of information available to visitors

▶ The range of things to do, particularly in wet weather

▶ The volume and speed of traffic in Hugh Town

▶ That any product improvement and development should be of a type and scale that retains the unique environmental quality and beauty of the islands

▶ It is essential that the visitor experience lives up to the marketing message. Product improvement is vital to deliver that promise.

3 PRODUCT IMPROVEMENTS

VISITOR JOURNEY – STAGE 1: DREAMING AND LOOKING

This stage is delivered through marketing and communication – promoting the islands to new customers and keeping past visitors up to date with new developments, services and activities. This area is dealt with in the Marketing and Communications Plan.

VISITOR JOURNEY – STAGE 2: BOOKING AND PLANNING

Regular visitors – those 'in the know' – enjoy their special status – including personal relationships with transport operators and providers. It feels like a club where only the initiated know the rules. People wear their know-how like a 'badge of honour'. But for first-time visitors there are significant barriers to booking which can be very off-putting:

▶ Research on current visitors indicates that travel costs are not their main concern. This is probably because the Island 'regulars' have rationalised the costs and time of travel against their desire to return to Scilly. But for new customers, with a much wider choice of holiday options at home and abroad, cost does become an issue. Our comparator research confirmed that both the air and sea journeys to Scilly are more expensive than similar modes of transport to other UK and European islands.

▶ Co-ordinating and booking all the elements of transport and accommodation required to make the journey to Scilly is complex and time consuming. It puts Scilly at a competitive disadvantage.

▶ There is a lack of practical information about getting to and moving around the islands available before visiting.

Booking and Planning – *the 'big issues' that emerged from:*

Visitor Surveys
Booking has 'Club' approach/Closed shop
Booking accommodation difficult
Non-acceptance of Credit Cards

Community Consultation
Accommodation booking difficult
Need real-time availability
Season getting shorter
Scilly offers poor VFM
Credit Cards must be taken

Consultation Workshops
Need to maintain core season
More special offers
Off-islands have low profile
Poor info on accommodation availability

Focus Groups (non-visitors)
Low levels of awareness about Scilly
Islands remote and difficult to get to

Travel costs and integration

We recognise that limited carrying capacity and infrastructure and a relatively small customer base makes it hard to reduce the cost of travel. However, the perception of value for money can be improved through the development of integrated ticket options. The perception of high cost is increased by being unable to book the journey as a single transaction. The number of individual payments often needed – car parking/rail travel, overnight accommodation, boat/plane/helicopter, airport tax, taxi/off-island launch – do add to the perception of expense.

There should also be the opportunity for visitors to access discounts and 'deals' for advance booking. This may be especially valuable as a means of capturing new customers who, as our focus group research showed, are interested in visiting Scilly, but have never acted on that interest.

As a minimum, travel operator sites should have better and clearer links to associated travel information and booking (rail/flights, rail/ferry/en-route accommodation, ferry/inter-island travel etc). The destination website should also include advice on travel modes and combinations of transport and en-route accommodation.

In addition, Scilly needs to work towards integrated ticketing between operators to improve ease of booking and perceived value for money.

Accommodation availability & booking

Finding and booking holiday accommodation, particularly at short notice, is difficult. Scilly will increasingly be looking to attract new markets, so potential visitors must have easy access to real-time availability and details about their prospective accommodation, including good-quality images of the property and facilities. The current system of patchy TIC-held information about availability accessible only via the telephone is not fit for purpose in today's marketplace. Off-Island sites have online availability – it should be available Scilly-wide.

Whether to provide online booking facilities should, in our view, be a decision for individual businesses. We would recommend a real-time online availability service that includes the capacity for online booking, and leave it up to each individual business to decide if they want to take up the option or remain with a telephone and/or email service.

Some first-time visitors may prefer the option to book a holiday on Scilly as a package. Greater prominence for packaged booking options (offered by commercial partners) on the destination website would raise the profile for single transaction bookings. The destination website

development should also include the option for consumers to create a customised itinerary online from the range of travel and accommodations options listed.

Practical information

After booking, detailed, searchable information is not easy to find. Information about arrival, what to wear, what's on offer for different age groups and tastes, where to eat, inter-island transport, recycling issues, seasonal wildlife interest should be available in web and print form.

Credit cards

Today's visitor expects to be able to use credit and debit cards in booking and planning, and during the visit. The inability to do so appears out-dated rather than quaintly old-fashioned. Making large cash purchases on Scilly reminds visitors how much they are spending and discourages them from spending more.

Booking and Planning - Actions

Visitor Perspective	Actions
Booking transport and accommodation to and from the islands from home is uncoordinated and complex and is expensive	▶ A new destination website to assist would-be visitors with the following: • advice and web links on the connections between complementary services - rail, flights, accommodation in Penzance, parking, inter-island boat services etc. • integrated ticketing options for customers that link rail travel, boat or flight to the islands, taxi or off-island launch on arrival into one price payable online • lists of recommended accommodation in Penzance and Newquay, with web links to their sites • package holiday options shown prominently • integrated ticketing options with advance booking offers to encourage new customers • online real-time accommodation availability service, administered centrally, with the capacity for customers to book online. The service could be made available as an option to businesses that are members of Scilly Tourism Partnership
Lack of co-ordinated factual, searchable information on the islands and visitor options	▶ The new website to ensure searchable rich content linked to partner sites AONB/Wildlife Trust etc (which can also be accessed offline via phone/post) ▶ Develop 'handbook' style advice available for purchase online, similar to Rough Guide or Lonely Planet in style, approach and information content
Large number of places don't accept credit cards	▶ Make arrangement with a major bank to offer businesses in the Scilly Tourism Partnership a cost-effective deal for use of debit and credit card transactions. This applies to pre-arrival purchases and the purchase of goods and services during a visitor stay and subsequently. As an interim option, encourage accommodation businesses resistant to taking cards to create 'PayPal' accounts to accept advance payment for deposits or full bookings

VISITOR JOURNEY – STAGE 3: THE JOURNEY THERE

The journey to the islands can be long, unpredictable and prone to delay. This is because of geographical location, limitations on aircraft and boat size and small passenger volumes. We recognise that, given its location, a trip to Scilly will always be a long journey, and vulnerable to variable weather conditions.

During our work uncertainty about the future operation of transport services has arisen. Solutions to these crucial issues are outside the remit of our Study. But we would emphasise that any loss or reduction in services will adversely impact on the islands' tourism future. Making travel to the islands more difficult will simply make a visit less attractive. Delay in introducing a new Scillonian with its prospect of a year-round boat service will make it less easy to expand the tourist season on the islands.

Information and customer service

However, there are some potential product improvements that could help to mitigate the problems with travel, and some basic customer service improvements that would make the journey, however long or delayed, more comfortable. This includes providing better information and customer support and reassurance for those suffering delays.

Improvements to equipment and infrastructure, particularly at the airport, would help to improve reliability of services in conditions that currently require cancellations. These are likely to be long-term developments but should be pursued as a priority in improving the service.

The Journey There – *the 'big issues' that emerged from:*

Visitor Surveys
Delays and disruption a problem
Travel expensive – premium holiday

Community Consultation
Travel costs too expensive
Poor information/service

Consultation Workshops
Transport delays big problem
Travel costs key issue
Improve info on Scillonian
Need meet and greet at quay

Focus Groups (non-visitors)
Travel expensive
Long journey times

Travel as part of the experience

Scilly should use travelling distance as an opportunity by presenting the 'adventure of travel' as part of Scilly's differentiation. The Scilly Tourism Partnership should work with the rail company to ensure the sleeper service is coordinated with the ferry sailings and promote the service as exciting and a good use of time – both a 'responsible travel' choice and part of the 'adventure' of a holiday on Scilly. It should also promote selected accommodation providers in Newquay and Penzance, so that overnight stops are 'on brand' and add value to the journey.

Scillonian – on-board information & disembarkation

Ideally a new Scillonian IV, related quayside improvements, and all-year-round sailings, will improve the visitor experience and choice. However, regardless of new developments the opportunity should be taken in the short term to address the current poor quality of the embarkation infrastructure at Penzance (no shelter, no clear information, poor signage), the low profile and quality of on-board information about Scilly, the lack of information about arrival at St Mary's and the currently muddled, confusing disembarkation procedure and transfer to off-island boats.

The Journey There - Actions

Visitor Perspective	Actions
Travel prone to delay. Quicker to fly to Europe	▶ Work more closely with ground staff at departure airports to improve customer information for delayed passengers – e.g. training days, familiarisation visits to Scilly for customer-facing staff ▶ Work with the rail company to create anticipation on the journey. Coordinate and promote the sleeper service as exciting and good use of time, as well as a 'responsible' choice ▶ Develop a list of preferred 'Scilly accommodation providers' in Newquay and Penzance, so that overnight travel stops are 'on brand' and add value
Lack of information for customers en route	▶ Provide more information during the journey e.g. flat screens on boat and at airports with a mix of useful travel information and visual imagery of the islands (including adverts to offset costs)
Confusion on disembarking at St Mary's	▶ Better information at the quay, on screens or prominent boards ▶ Organise TIC staff and/or volunteers to meet and greet at quay, to reinforce the welcome on arrival and direct confused visitors

VISITOR JOURNEY – STAGE 4: THE DESTINATION EXPERIENCE

Customer service

The quality and beauty of the natural environment, the sense of space and tranquillity, and the clean fresh air and seas make Scilly a special place. The quality and consistency of customer service and facilities must match the excellence of the natural environment and reinforce a sense of place.

Scilly customer service is uneven. This manifests itself in a number of ways:

▶ indifferent service in some catering establishments

▶ old-fashioned accommodation facilities and patchy customer-care standards

▶ limited facilities open out-of-season, and on Sundays in-season

▶ a lack of information on what to do and see on the off-islands.

Today's customers are used to high levels of customer service and are critical when they feel it falls short of expectations or undermines perceived value for money. The view expressed to us on numerous occasions was that the industry had become complacent: used to getting high volumes of business over the years from loyal visitors and unable, or unwilling, to improve standards.

Businesses cannot afford to be complacent now that Scilly faces fierce competition for the new customers it needs to attract. There are many businesses that recognise this and are taking appropriate action, but those that don't let down the visitor experience.

The Destination Experience *– the 'big issues' that emerged from:*

Visitor Surveys
Accommodation basic/Needs updating
Eating out expensive
Some locals' attitude to tourists poor
Traffic volumes and speed a problem
Deterioration in litter and public realm
Need for wet-weather facilities
Complacency evident in businesses
Expect sustainable businesses

Community Consultation
Customer service variable
Food offer expensive
Local attitudes can be poor
Need more activities & activity holidays
Must retain environmental quality

Consultation Workshops
Good customer service critical
Business attitudes outdated
Poor business networking
Wider use of local produce needed

Focus Groups (non-visitors)
Perception of lack of things to do

Accommodation

Visitors expect the facilities in their holiday accommodation to be as good, and preferably better, than at home.

A significant proportion of B&Bs/Guest Houses and self-catering on Scilly are old-fashioned in look and feel – despite having 3 / 4 star NQAS accreditation, which is essentially a measure of facilities and service rather than of look and feel. The costs to either upgrade or, in the case of B&Bs, possibly to convert into self-catering are significant for businesses operating on narrow margins. Any opportunity to develop a grant or revolving loan facility for businesses seeking to invest in upgrading should be considered and discussed with potential funding organisations such as the Isles of Scilly Local Action Group, new Cornwall and IOS LEP, or the Duchy of Cornwall. Planning policies that are favourable to businesses wishing to convert to tourism accommodation to reflect the demands of the sector or extend space to provide better facilities will encourage and help that sector.

Scilly has potential to improve the current camping experience by providing luxury camping facilities – sometimes called 'glamping'. Any provision needs to be sensitively located, targeted to an audience suitable for Scilly's market profile, and at a scale that does not compromise its appeal to potential high spending visitors.

Sustainable business

Surveys show that visitors expect the industry on Scilly to adopt sustainable business practice to maintain the high-quality environment. There is scope to bring more businesses into a 'Scilly standard' on green practice, and to communicate the message about the sector's husbandry of the environment and the particular problems faced by Island communities.

Local produce

There is a growing expectation that local produce will be widely available at a destination. Some businesses strive to offer good local produce, while others do not, or do not advertise the fact. Better supply chains between local producers and the hospitality sector should be worked on to fulfil this visitor expectation and help to build local distinctiveness.

Hugh Town/St Mary's

Visitor research shows a growing disaffection with the volume and speed of traffic and the general quality of the public realm in Hugh Town – at odds with the marketing messages about the slow pace of life and quality of the environment. The development at Porthcressa will help to improve the public realm around the bay, but a critical eye needs to be passed over other parts of the town to identify where improvements are required. Some discreet direction signage for pedestrians will help visitors to make the most of the island. Resources are an issue of course, but the quality of the built environment in Hugh Town is critical in shaping visitor perceptions of the islands as a whole, particularly for day visitors and the cruise markets (who may be tomorrow's staying visitors).

Visitors need better information about the opportunities to explore St Mary's beyond Hugh Town on a day trip. This can be delivered via better information on the destination website and through one of the family of Island leaflets available to visitors (see Inter-island travel below)

Inter-island travel

The inter-island boat services compared favourably with other destinations in terms of price in our comparator research. However, given that trips between the islands are central to the visitor-activities offer, over the course of a stay the cost of repeated boat trips can add up and appear expensive. While multi-trip tickets are available they are not widely advertised or available to be purchased in advance of a visit (although the St Agnes service is doing more to promote its weekly passes). Multi-trip passes and advance purchase would improve the product offer and the perception of value for money.

Visitors exploring the islands are not particularly well served with information about the things to do and see on each island. Where information is produced it comes from different sources and lacks consistency and a common brand. Visitors to the off-islands may be unsure about their distinct character and history and what is possible to do on a day trip between arriving and catching the boat back to their 'home' island. We believe there is scope for producing better information for visitors as part of delivering integrated marketing and information.

Events and activities

Scilly has been active in developing events to encourage new markets – the Gig Championship, Walk Scilly, the Folk Festival, the Food Festival etc. There is room in the calendar for one or two new events that support the brand image of the islands. For example, an autumn Walk Scilly, possibly allied to the islands' bird watching opportunities, could help to replace the lost 'twitchers' who formerly came in the autumn season.

The range of activities for visitors on Scilly is well established and popular.   However one of the fears that came through strongly in the focus group research was that there would not be enough to keep visitors interested. So there is a case for looking at a range of new activities that could include expanding the evening slide show options to include for example 'Welcome to Scilly' introductory evenings, island history and more live music events.   Day-time activities might include farm walks, business open days or craft fairs that provide additional things for people to see and do. These activities need to be well promoted and prioritised to focus on those most likely to appeal to empty nesters.

Walking the islands is one of the most popular and low-impact activities undertaken by visitors. There is a lack of good information available to customers about walks on each of the islands. A developing website www.walksaroundbritain.co.uk showcases walks on its website through video and text directions, and on DVD – from which maps and MP3 files can be downloaded. A walk for Bryher is in production. We recommend the owners of the site are contacted with a view to Scilly developing a walk for each Island that can be reproduced and sold as a DVD, or made available to accommodation providers for guests to access.

Scilly could strengthen its profile for activity holidays. Partly this is about effective targeted consumer marketing but partly also about the trade working together to identify providers both from Scilly and the mainland to host new activities on Scilly. This approach is most appropriate for well-being and arts-activity holidays, such as yoga and photography. Such holidays should offer a single cost for the activity and accommodation. Trade associations and professional bodies should be contacted to establish demand, opportunities and best practice, to inform planning and development, as well as help with niche marketing (see our Marketing Plan).

There may be potential also to attract a younger market for water-based activities such as inter-island wading and swimming, Scilly-scale 'coasteering', diving on wrecks, seawater kayaking, gig rowing etc. This requires existing qualified teachers on Scilly to explore the potential for packages with accommodation (and for the Scilly Tourism Partnership to support promotion of the opportunities – see Marketing Plan).

The Destination Experience - Actions

Visitor Perspective	Actions
Quality of customer service is patchy and does not always reflect the prices charged	▶ Improve business networking to develop peer review and mentoring using best practice workshops to identify new market opportunities to meet changing visitor expectations ▶ Agree a core 'open season' when businesses who are members of the Scilly Tourism Partnership commit to remaining open for business and encourage others to adopt it too ▶ Coordinate staggered opening and closing at the start and end of the season so that there is a guaranteed minimum level of service and facilities in the shoulder periods ▶ Develop a shared staff recruitment and training programme that establishes core service values ▶ Consider the introduction of a 'Scilly Service Apprenticeship' that offers seasonal staff the opportunity to work in different establishments throughout the season to support their learning and to encourage staff retention and engagement ▶ Explore the possibility of setting up a local quality assurance scheme, establishing standards that are fully endorsed and supported by businesses, and distinctive and appropriate to Scilly's priority target markets
Some accommodation is outdated and in need of refurbishment, particularly in the serviced sector	▶ Support businesses seeking to convert to self-catering accommodation from serviced, and allow adaptations and extensions to existing properties through planning policy where appropriate ▶ Explore the potential for setting up a grant or revolving soft loan service for small businesses seeking to invest in upgrading the accommodation offer ▶ Support the introduction of sensitively sited and scaled luxury camping provision within existing facilities
Visitors want businesses to demonstrate a commitment to the environment, to preserve the quality of the islands	▶ Develop and introduce a 'Scilly Standard' sustainable business training support and awareness programme with advice, visits and workshops on green business practice ▶ Provide better information for visitors on the unique environmental problems facing the islands, and the management processes to mitigate them – produce a simple handout and include a section on the website and in the Scilly Handbook

Visitors expect to see local produce served at their accommodation and in food outlets.	▶ Encourage greater promotion and use by accommodation and food businesses of local produce through 'Meet the Buyer' events, training workshops, and B2B supply chain information in print and online
Hugh Town is functional rather than attractive. Public realm is low quality and traffic intrusive. Presents poor first impression for day visitors	▶ Explore ways of slowing traffic in the town centre and around the quay to reduce traffic/pedestrian conflict ▶ Critically assess where townscape presents poor impressions to visitors and research visitor opinion on priority areas for improvement.
Can get lost on islands – or at least fail to explore the whole island and/or get the best out of the experience.	▶ Plan and install discreet pedestrian direction signage on St. Mary's ▶ Produce a family of leaflets/downloadable pdfs to provide visitors with necessary information backed up with more detailed interpretation on web/phone apps on specific areas of interest ▶ Offer print versions through TIC, accommodation, with boat ticket purchase ▶ Discuss with walksaroundbritain.co.uk the option to produce walks showcasing each of the islands
Limited evening entertainment and day-time activity options. Same events repeated year on year – little new for repeat visitors or designed for new visitors	▶ Support individuals to run new evening events to expand existing offer – might include 'Welcome to Scilly' introductory evenings for new visitors, presentations on the islands' social and landscape history, and concerts showcasing their musical traditions ▶ Explore new daytime activities to offer to new markets: farm walks, business open days, craft fairs etc.
Explore options for new activity holiday products	▶ Discuss with local providers – as well national operators such as HF, Exodus etc – the opportunities for organised activity holidays e.g. yoga/well-being breaks, photography, wild swimming

VISITOR JOURNEY – STAGE 5: THE JOURNEY HOME

The issues here are the same as those for 'The Journey There', although there are two issues specifically to do with luggage collection at Penzance and advice on where to eat for those passengers waiting for a train connection.

The Journey Home - Actions

Visitor Perspective	Actions
Basic service for collecting luggage off boat. No protection in poor weather	▶ Ensure quay facilities provide adequate cover and luggage reclaim system
No information on options for those waiting for train to continue journey	▶ Provide on-board information, on return leg, of options for eating or activities for those waiting in Penzance for train. Offer luggage storage option for those with a wait

VISITOR JOURNEY – STAGE 6: REMEMBERING, REMINISCING, REPEATING, RECOMMENDING

This element of the Journey is predominately about improving post-visit customer relationship management and is covered in the Marketing Plan. However, an important part of the process is the ability for visitors to purchase and take home things that reflect the character of the destination. Scilly is well served with suitable local products and there is an opportunity to better promote 'souvenirs', and to offer post-trip purchases through the destination website as part of an on-going CRM programme.

Remembering, Reminiscing, Repeating, Recommending - Actions

Visitor Perspective	Actions
Want to take home branded clothing, jewellery, chocolate, art etc	▶ Encourage accommodation providers to use and promote local products e.g. local produce, showcase local artists ▶ Offer sales on the Scillonian and at the airport for last minute purchases. Improve display and range currently available at airport
Be reminded of the visit and Scilly's unique qualities	▶ Provide access to online shopping offers through on-going CRM programme, e.g. for clothes, flowers, jewellery, art etc

4 RECOMMENDATIONS

There are a large number of product improvement projects to get on with and so it is important to be clear about those which are essential to do, which support and add value to other recommendations and which will need to be prioritised if resources are limited.

We believe that the introduction of all these improvements will, collectively, raise the quality of the Scilly visitor offer, but in the short to medium term we recommend the essential product improvement projects are:

▶ The majority of actions related to 'booking and planning', because they help maximise bookings and help overcome perceptions of travel time and cost

▶ Improving first impressions and the experience of Hugh Town/St Mary's – St Mary's is a showcase for Scilly, it has a role to help convert day visits to stays in subsequent years

▶ Destination experiences and investment that drive up service and the quality of accommodation to improve competitiveness (and ensure positive word of mouth in this new world of user-generated content, social networking etc)

▶ Destination activities that help overcome the perception of little to do and encourage visitors to explore further and spend more.

5 TIMELINES

In the table below we summarise all the product improvement projects and set them against a timeframe for delivery. This helps to identify where there are potential 'quick wins'.

Code:

E = early – to progress as soon as is practicable
M = medium timeframe – aim to complete by 2014 or earlier where possible
L = longer timeframe – because of the nature of the project it requires a longer lead-in time for delivery. Completion likely to be 2014+
E-M = where an action involves several tasks some of which can be progressed now and others which require a longer lead-in time.

Action	Time
Booking and planning	
Integrated ticketing and travel information	M
Online real-time accommodation service	M
Travel/accommodation packages	M
Searchable web content	E
Scilly handbook	E
Credit card bookings	M
Journey there	
Build holiday anticipation with good info from air/rail carriers	M
Offer mainland accom booking options for early start departures to Scilly	E
On-arrival information at St Mary's quay	E-M
Destination Experience	
Customer Service	
Quality assurance scheme for Scilly	M
Peer review and mentoring	E

Shared staff and recruitment	E
Scilly Service Apprenticeship	M
Seasonality	
Establish an agreed core season and staggered off-season opening	E
Environment	
'Scilly Standard' sustainable business training support and awareness programme	M
Improve Hugh Town/St Mary's public realm and signage	E-M
Accommodation	
Revolving loan scheme to enable business investment in facilities	M
Encourage planning to support appropriate tourism developments	E-M
Inter-island travel	E
Events and activities	
New major events	M
Enhance range of low-key activities	E
Local Produce	
Encourage visitors to purchase local products/produce during stay and online subsequently	E
Projects for further research	
Develop potential of activity holidays – passive to high-adrenalin activities	L