BLUE SAIL►

VISITORS PLACES DESTINATIONS

FUTURE OF TOURISM ON SCILLY: RESEARCH PLAN

TECHNICAL PAPER FOR ISLAND MARKETING

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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	Research Plan (this paper)
Product Improvement Plan	Storyboard
Marketing Plan	Consultation Meetings Report
Tourism Organisation Report	Marketing Workshop Report
Research Summary	

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

2   RESEARCH NEEDS

This paper looks at short to medium-term research needs for Scilly. While the ideal would be wide-ranging comprehensive and ongoing research – both qualitative and quantitative – we assume that Scilly Tourism Partnership (STP) will have a limited budget, and so we have shaped our recommendations accordingly.

STP's research programme will need to cover four areas:
- ▶ Visitors
- ▶ Non-visitors
- ▶ Visitor economy performance
- ▶ Marketing evaluation.

While STP should lead and coordinate this research, the transport operators and other tourism businesses will have a key role to play helping STP to shape and plan research studies, and to gather information – and then using the results to improve the visitor experience.

3   VISITORS

The core primary research work will be with **visitors** – profiling them, understanding their decision-making processes, influences, activities during a visit, levels of satisfaction, intention to return etc.

Because of its size and location – with limited and controlled transport gateways, and a friendly 'captive' audience with time on their hands once on the islands – Scilly should find surveying current visitors and collecting their data relatively easy compared to most UK destinations.

We recommend that STP sets up **the Scilly Visitor Experience Survey,** as follows:

Survey details	Rationale & notes
A self-completion questionnaire	Because this is appropriate for the type of questions, it is practical and more affordable than other methods
Two different collection methods: at key points **during the visit** (paper questionnaires in accommodation; at port or on ferry at departure) or **online afterwards**.	This should generate a robust dataset for analysis. There will need to be some caution in analysing the data as some differences might be attributable to the medium To minimise the risk of multiple responses from the same people, the questionnaires completed during the visit should be handed out to visitors by the accommodation providers/transport operators etc, and then collected back after completion. Supplementing with the online version will help the profile of respondents
Conducted over the season and repeated annually or every other year	It can be tweaked each time – but should always feature the same core questions so STP can track findings over the years. It could feature questions used in the self-completion surveys collected in 2007-09, so would allow comparisons with earlier years too. However, this survey would be more concise, in order not to be too onerous.

As well as the Survey, we recommend regular **Scilly Visitor Postcode Profiling** to provide much more detailed information about segments. STP would work with the transport operators to segment current visitors from the UK by analysing home postcodes of leisure visitors travelling to Scilly. Anonymised bookers' postcodes can be fed through Experian's system at regular intervals (e.g. annually) to identify geographic locations and – more importantly – which of the 60+ Mosaic segments are most attracted to Scilly.

4 NON-VISITORS

Primary research

As Scilly already has the results of four focus groups with non-visitors, which took place in 2011, we recommend STP focuses on quantitative research in the short to medium-term. STP needs to find out about non-visitors' awareness and perceptions of Scilly, who Scilly's competitors are, what the barriers are, the appeal of marketing propositions, and the impact of Scilly's marketing activity. We recommend running the **Scilly Non-Visitor Online Survey** as follows:

Survey details	Rationale & notes
An online survey, using a panel of respondents to a given profile	An affordable method, which would allow visuals to be shown and evaluated (NB an omnibus version – i.e. buying questions in another organisation's survey – would be lower cost but less flexible)
Ad hoc frequency	i.e. as and when budgets allow. It can be tweaked each time – but should always feature the same core questions so STP can track findings

Desk research

As well as primary research, STP should be using desk research to track:

▶ UK market trends – Monitor free and paid-for market trends information e.g. from media, Mintel, VisitEngland, to make sure Scilly is responding to latest trends in both product and marketing

▶ Overseas markets – Read free online Market Reports and regular updates from VisitBritain – to understand overseas markets.

5   VISITOR ECONOMY PERFORMANCE

Scilly Tourism Partnership needs to set up systems to monitor and track how the visitor economy performs. Ideally, these would begin as soon as possible, to establish a baseline against which to measure future activity.

STP should be monitoring:

▶ *Occupancy/yield* – for hotels, b&bs and self-catering accommodation. This needs to be a confidential and anonymous system – only participating businesses (and STP) to see the results

▶ *Turnover* – for non-accommodation businesses. This would use a base 100 index that allows businesses simply to report a percentage movement monthly or annually, rather than actual figures

▶ *Enquiries* – all businesses. Can either be actual numbers or again an index that shows movement / trends and will allow year-on-year comparisons

▶ *Optimism* – a quarterly business confidence survey.

6   MARKETING EVALUATION

Marketing activities should be evaluated against the objectives. As a minimum, STP should be measuring/monitoring:

▶ *Digital marketing stats* – i.e. Web, E-marketing, Social media

▶ *PR coverage*

▶ *Brochure conversion* – using follow-up telephone research to a sample of people sending for the brochure, 3 weeks after the brochure is sent (these can be done inhouse or sub-contracted; can also act as sales calls to prompt conversion)

NB Our Marketing Plan has recommendations on Customer Relationship Management (CRM), including asking people who respond to marketing activity to answer a standard set of 'killer questions' so that they can be profiled and contacted again.

7   COSTS

Research	Ballpark costs – excluding VAT
Scilly Visitor Experience Survey	£8,000 in Year 1; £5,750 in Year 2 onwards NB This covers creating questionnaire, online version, data entry, data tables, analysis & a report on the findings (not print or distribution costs of print questionnaire)
Scilly Visitor Postcode Profiling	£1,000 per run This allows the data to be subdivided once (e.g. by air, by sea). Results are spreadsheets of data showing actual figures and indexing for each Mosaic segment. Also includes simple maps showing origin of visitors.
Scilly Non-Visitor Online Survey	£4,000 - £5,000 per run
UK market trends – desk research	£1,500 p.a. (for Mintel etc)
Overseas market intelligence	Staff time only (free resource from VisitEngland/VisitBritain)
Visitor economy performance monitoring	Small initial set-up costs – but then mostly staff time
Marketing evaluation	Digital marketing – staff time to analyse readily available stats Print/broadcast media coverage – build into PR contract Brochure conversion – build into distribution contract