

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

# FUTURE OF TOURISM ON SCILLY: MARKETING PLAN

TECHNICAL PAPER FOR ISLAND MARKETING

APRIL 2011



# CONTENTS

1	BACKGROUND.....	3
2	MARKETING: STRATEGIC DIRECTION .....	5
3	MARKET TRENDS: OPPORTUNITIES FOR SCILLY .....	6
4	TARGET MARKETS.....	7
5	POSITIONING .....	14
6	MARKETING PROGRAMME.....	17
	APPENDIX 1: CUSTOMER RELATIONSHIP MANAGEMENT (CRM) ...	22
	APPENDIX 2: MORE ABOUT NICHES .....	24

# 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
- ▶ **Marketing Plan (this report)**
- ▶ 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](http://www.scilly.gov.uk/community/tourism)*

## TO SET THE SCENE ...

Tourism is vital to Scilly. It supports jobs, businesses, services, transport and quality of life. And so it affects everyone living on the islands.

Scilly is a very special place, and many thousands of people love it. But visitor numbers are falling: they are down 8% since 2005, while UK leisure tourism is broadly level over that period.

The steepest decline in recent years is 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. They are much less likely to be

loyal – so 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 dramatically 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 very different 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.

But, as well as this stiff competition, there are opportunities for Scilly in today's market trends.

Among these market opportunities are:

- ▶ *the 'stay-cation' effect* – an increasing interest, among certain UK segments, in holidaying in Britain rather than travelling overseas
- ▶ *the success of Cornwall* – with very high visitor numbers, satisfaction levels, and consumer awareness as a holiday destination
- ▶ *advances in digital marketing* – which means small destinations can target new customers cost effectively, and strengthen relationships with existing customers.

## 2 MARKETING: STRATEGIC DIRECTION<sup>1</sup>

Scilly needs to continue to retain existing customers – to persuade current visitors to visit again, to visit more often, bring others with them, and recommend to others. But Scilly is also going to have to attract (and keep attracting) much higher levels of *first timers*. We have identified priority target segments in Section 4. These new visitors are much less likely to repeat than previous generations. But, if not ‘loyal devotees’, they could become ‘Scilly ambassadors’ – recommending Scilly to family, friends and colleagues, and increasingly to the wider world of their peers via social media.

This ‘new breed’ of consumers have low awareness or understanding about where – and what – Scilly is. They have high quality expectations. They are demanding: they look for holiday destinations that offer a range and variety of activities and experiences. They are experienced and savvy consumers. They prefer to make holiday decisions based on recommendations from other consumers, independent travel writers and trusted brands.

So Scilly needs to:

- ▶ **Raise awareness and develop a Shared Story™**– to position it strongly as somewhere different and special
- ▶ **Identify, understand and target** those market segments that are most likely to deliver new visitors
- ▶ **Develop product** (quality, experiences, events, offers etc) that will appeal to and satisfy them
- ▶ **Deliver on the whole visitor journey<sup>2</sup>** which means:
  - Develop and deliver marketing communications that inspire and inform
  - Satisfy the customer through the next stages: booking and planning, travel, and the destination experience itself
  - Stay in touch following the visit - and help visitors to recommend Scilly to others

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<sup>1</sup> For more information and rationale, see our Research Paper and Marketing Workshop Report

<sup>2</sup> See our Product Improvement Plan for an explanation of the visitor journey model

### 3 MARKET TRENDS: OPPORTUNITIES FOR SCILLY

**“Staycations are here to stay”:** VisitEngland’s research is promising: it suggests that there’s a new generation of Brits who are discovering the UK for the first time who are open to new ideas and experiences. And neighbouring Cornwall – a potential ‘route to market’ for Scilly – is the highest-scoring English holiday destination when it comes to visitor satisfaction, its visitor stays are longer than others (averaging 7 nights), and its visitor numbers continue to grow (now 6m+ p.a.).

**“The best things in life aren’t things”:** In our relatively affluent society, people want leisure breaks to deliver a range of experiences and benefits – from relaxation, fun and ‘quality time’ with loved ones, to enlightenment, self-improvement and status. We’ve identified a trend we’ve called ‘New Traditionals’ – relatively comfortably-off people who enjoy rediscovering values and skills from previous times such as homebaking, handmade clothes, keeping chickens, and ‘make do and mend’: the whole idea of rediscovering a simpler time and enjoying a simpler less-commercialised lifestyle. Allied to this, the notion of ‘proper holidays’ (currently being cleverly marketed by Visit Wales) plays to market segments who see leisure breaks as an opportunity to (at least temporarily) enjoy those simpler values. They’re looking for simple outdoor pleasures, DIY entertainment, local produce, unbranded suppliers, live cultural experiences, low-tech pleasures.

**“People are more complicated than that”:** Because social conventions have loosened, leading to fragmented and extended families, and with individualisation and less-regimented lifestyles, people are now much harder to define by the ‘old’ socio-demographics/lifestages. Marketers are having to find new ways to understand and describe their target segments. Destinations that get properly ‘under the skin’ of their target markets – through market research and proper customer relationship management – are much more likely to succeed.

**“Social changes everything”:** Technology has had a huge influence on the ‘visitor journey’. Most destination marketers have responded with attractive websites incorporating video and mapping, some with bookable product, some with e-news and SMS marketing. But within the last 2 years, social media has transformed not only the channels marketers use, but the way in which we interact with consumers. Savvy destinations are providing opportunities for visitors to post user-generated content; they are posting images and videos on Flickr and YouTube, providing information and inspiration on blogs and Facebook, tweeting news flashes and whimsical thoughts, working with industry to interact with visitors on TripAdvisor etc. Compelling ‘content’, genuine stories and authentic differentiation is the key to making this work. And that’s where Scilly has the advantage over so many other destinations.

## 4 TARGET MARKETS

Scilly isn't for everyone. It's a very distinctive experience, it is remote and difficult to get to, and it is comparatively pricey. So it's important that Scilly focuses its marketing resources on attracting more people who will love the place, respect its special nature, understand Scilly's character and pace of life, and share its values. And who can afford to come.

It makes sense to prioritise those who should be most easy to persuade – that is, people who we know are already receptive to the idea of visiting Scilly, or places like Scilly, or are already looking for a holiday that features one or more of the special activities and experiences Scilly can offer.

Of course this doesn't mean that other people won't come. It is just a question of targeting finite marketing resources where they will make most impact.

### THEIR VALUES

The best prospects are:

- ▶ *Early adopters* – people who actively seek out experiences that are new and different
- ▶ *Internally referenced* – people who 'go their own way', are comfortable going off-the-beaten-track, & can make their own entertainment.
- ▶ *Outdoorsy/hardy/resilient* – because the journey is not for the faint-hearted, and Scilly's core experiences are really for people who enjoy the elements
- ▶ *'Responsible' consumers* – because they are more likely to appreciate Scilly's special nature, will enjoy supporting local suppliers, and will be less tempted by overseas alternative

## WHERE FROM?

Best prospects for Scilly are to be found among (in this order):

1. People living in the wider South West and also within easy reach of Southampton and Bristol Airports – for whom the journey is shorter
2. People planning/taking holidays in Cornwall – from UK & overseas (ideally persuading people to plan-in a day trip or a few days on Scilly at planning stage – but also tactical activity to target people for day trips once in Cornwall)

Of course Scilly will also continue to attract visitors from further afield – including those with easy access to the mainline rail route, or with easy access to flights to Newquay Airport.

Affluent Londoners are important for Scilly – and a significant number of the visitors to Cornwall that Scilly targets will come from London. Londoners will also be targeted through work with First Great Western on using rail (especially the sleeper, which adds to Scilly's 'distinctiveness' and also reduces costs/time spent staying overnight on the mainland en route).

Scilly attracts visitors and media interest from European countries – from Germany and the Netherlands particularly, and to a lesser extent from France. There should be online information in German and French. European media and travel trade should be targeted by developing a closer working relationship with VisitEngland and VisitBritain, and via Visit Cornwall (Germany is currently the only international market VC proactively targets, and they have a contract, which Scilly could buy into, with a German PR agency).



**SOCIO ECONOMIC / DEMOGRAPHICS / LIFESTAGE**

We recommend 2 broad target markets, in this order of priority:

Who	Why
<p>Active Empty Nesters <i>See p10 for more details</i></p>	<p>In general empty nesters have a much higher propensity to take domestic trips than those in earlier lifestages – for many, this is the time of life to ‘rediscover’ the UK. They have the time and money to take regular holidays and shortbreaks. They are free (and prefer) to travel in ‘shoulder’ months. These specific types of people already index highly for Scilly, and Scilly has long experience of satisfying people in this lifestage – although it’s important to understand that today’s empty nesters are a ‘new breed’, with greater expectations, and are more footloose than previous generations. This is already a significant market for Cornwall.</p>
<p>New Traditionals Families <i>See p11 for more details</i></p>	<p>Families bring important peak time business for Scilly, and are important for building future long-term business too, as happy children will re-visit at various stages throughout their lives. Competition for affluent families is fierce – from other destination in the UK and overseas, including new family-focused festivals (‘pop-up destinations’). So we believe that some marketing resource is needed to maintain this market.</p> <p>The New Traditionals trend fits with Scilly’s families offer – as Scilly gives parents the opportunity to provide their children with space, freedom and simple pleasures. However, today’s children are much more demanding in terms of levels of entertainment, technology &amp; consumerism – and many parents will be concerned about Scilly’s ability to keep kids entertained, especially in wet weather. Even for New Traditionals, some small-scale family-focused product development – including events – may be necessary.</p> <p><i>NB Focus group research found new parents with very young children were particularly concerned about the logistics of travel and lack of things to do in wet weather – and felt Scilly is more suited to older children (5+)</i></p>

**Primary: 'Active Empty Nesters'**<sup>3</sup>

*Comfortably-off, middle class, 'middle England'*

MOSAIC GROUP B PROFESSIONAL REWARDS  
TYPES – B06 – B08 – B10

- ▶ 50s to mid 60s
- ▶ Married couples with older teens & adult children living at home, or empty nesters
- ▶ Mid career or later – through to and including early retired
- ▶ Professionals / senior managers / SME business owners
- ▶ Comfortably-off. Settled. Middle class. Conservative (small c) mainstream/traditional values.
- ▶ Live in suburbs of towns and in commuter villages
- ▶ Go away as a couple or with friends.



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<sup>3</sup> Some wealthier 'Active Empty Nesters' will help build the families market as they will bring their grown-up children + grandchildren.

### Secondary: 'New Traditionals Families'

*Affluent/comfortably-off families with children aged 5 to early teens*

#### **Alpha** *New Traditionals* - MOSAIC GROUP A – ALPHA TERRITORY

- ▶ Cosmopolitan and cultured. Mid 30s to late 50s
- ▶ Living in leafier suburbs of cities
- ▶ Socio-economic group A. Affluent professionals – including finance, law, public sector & some self-employed.
- ▶ In positions of power & influence: opinion formers & decision makers
- ▶ Work hard, long hours. Work and personal lives are intertwined
- ▶ Best prospect for Scilly families market, due to high travel cost.
- ▶ May expect 'destination-status' restaurant/ accommodation.



#### **Aware** *New Traditionals*- MOSAIC GROUP O – LIBERAL OPINIONS

- ▶ Well-educated, well-paid professional couples. Creative jobs.
- ▶ Late 30s & 40s – couples
- ▶ Live in pleasant ethnically diverse neighbourhoods close to centre of large cities – like the cultural mix
- ▶ Guardian & Independent readers
- ▶ 'Responsible' consumers – green credentials – may travel by ferry for eco-reasons – interested in the "Slow" movement (see next section)
- ▶ Value happiness above material success.
- ▶ Will be interested in camping/glamping, quality self-catering, events



## NICHES

Advances in digital marketing mean it is now cost-effective for small destinations to target several niches (this is sometimes called 'long-tail marketing').

Niche activity should be driven by small groups of interested and specialist businesses working together (with the support of Scilly Tourism Partnership) to develop products, packages, events and itineraries – and then to use very tightly targeted routes to market.

Targeting niche markets can mean:

- ▶ working with specialist travel trade
- ▶ putting together special offers for members of specific organisations – then publicising them via the membership channels
- ▶ attending specialist consumer shows and membership organisations' meetings & conferences – possibly sponsoring them
- ▶ working with marketing partners who are targeting the same niche.
- ▶ using specialist databases for targeted e-mailshots (with tailored news and tailored offers)
- ▶ tailoring news releases for specialist media
- ▶ following/listening to niches on social media to understand them better and then interacting/joining the conversation
- ▶ advertising in specialist publications

The following are the niches that appear to have most potential for Scilly (but there may be more that businesses want to develop):

#### **Activities / Theme Niches**

For example: Luxury, Well-being, Active, Arts, Wildlife, Gardens – all of which tested well in research

#### **Active Gen X-ers Niche**

Early 30s upwards, without kids, looking for physical activities and challenges, and somewhere new and different

#### **Slow Travellers**

Part of the Slow movement – Slow travel is about physically slowing down to enjoy what is on offer, engaging with the local environment and fitting into local life

#### **Single women and women on holidays together**

Feeling comfortable and safe are important considerations for this niche – and Scilly offers the right environment and activities

#### **Weddings / honeymoons**

A huge market and an important niche for Cornwall – joint work with Visit Cornwall may be a possibility

#### **Visiting Yachts**

Well-off visitors who will spend money on land, but will expect a quality product

#### **Visiting Cruise Ships**

A growing and successful niche activity that currently brings 40+ cruise ships to the islands.

*There is more information about each of these potential niches in Appendix 2.*

## 5 POSITIONING

### DEVELOPING A 'BRAND'

It's hard for small tourism destinations to get noticed in today's highly competitive global tourism market. Developing a strong 'brand' is often seen as the way to achieve cut-through in this crowded and noisy marketplace. But it's not easy for destinations to become brands because:

- ▶ Most destinations are complex and fragmented: they cannot be neatly packaged, coherently presented, or described in a nutshell
- ▶ Many different people and organisations have an emotional or financial stake in them - residents past and present, investors, businesses and public agencies, and even visitors<sup>4</sup>
- ▶ The destination experience is often delivered by many different people and organisations - so it cannot be controlled or shaped 'to order'
- ▶ They mean different things to different people - and many of their stakeholders want it to stay that way
- ▶ The things they have in common with other places are often more obvious than the things that make them different - so it's a challenge to find and focus on the differences.

Destination branding is a long-term exercise, not a short-term fix. It usually takes years of developing a place in line with the brand, and consistent communications of the key messages, to plant a strong image of a place in the public psyche.

This isn't about logos and slogans. The most successful destinations have a simple Shared Story™ to tell – a story that everyone tells, not just the destination marketers. And 'everyone' means going beyond the traditional tourism businesses and transport operators to include the many local residents and other businesses and organisations. Importantly, it includes Scilly producers who export their produce: the farmers, fishermen, artists, musicians, gig builders, chocolate makers, clothing designers and jewellers etc.

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<sup>4</sup> Although a single tourism body or partnership can bring partners together to find consensus about how a place should be managed and marketed

It must be a story that makes it clear what is special and different about the place. It must go with the grain of the place, and be authentic and true. And it has to be credible: it mustn't be mistaken for 'marketing hype'. This is a particular challenge for Scilly, as we experienced in our research that non-visitors find descriptions of some of Scilly's natural features very hard to believe – see the notes on p18.

## DEVELOPING SCILLY'S STORY

To develop a Shared Story™ for Scilly we listened to what residents and visitors say about Scilly; we used creative exercises with some of the people who currently market Scilly's tourism offer to visitors; we looked at how independent travel writers describe Scilly; and we tested draft propositions in market research with non-visitors – in focus groups and via an online survey. From this it was clear that we should focus on:

- ▶ what makes Scilly unique - like nowhere else in England
- ▶ the special natural features e.g. unspoilt beauty, translucent waters, star-filled skies – explaining them in a way that makes them credible
- ▶ the activities – especially those that are distinctive e.g. small planes, helicopters, launches between islands, wading between islands etc

Many of the words and phrases in the Shared Story™ we have developed (see overleaf) are already being used by Scilly's marketers. This exercise has identified which propositions Scilly should focus on – and repeat consistently, positively and vigorously and with creativity – in order to create a clear, strong image in the marketplace.

Scilly's Shared Story™ is:

- ▶ *in simple language* – so that it is easy to remember and everyone is comfortable using it
- ▶ *true* – otherwise reality will disappoint, and it risks being undermined by cynicism
- ▶ *positive and enthusiastic* – to inspire the story tellers to feel pride in their place, and to inspire others to visit.

As well as the repetition of the actual words, these key elements, themes and messages should be reflected in all Scilly's marketing – the people and stories featured; tone of voice; creative style; images; choice of media; marketing partners. And the Story should influence the type and style of product improvement and development. As part of this project, we are producing a Storyboard of words and images that Scilly's stakeholders and marketing partners can use to inform and inspire their own marketing work.

## THE SHARED STORY

The Isles of Scilly are **like nowhere else in England**. An **outstandingly beautiful** cluster of islands off the coast of **Cornwall**, Scilly is **a world apart** from every day life.

Flying in by **small plane or helicopter**, or arriving by sea, you know immediately that you're somewhere **very special**.

Scilly's **natural history** means it **looks and feels quite different** from the rest of Britain: Washed by the Gulf Stream - and with **the UK's mildest climate** - over 100 small islands are clustered around a shallow turquoise **lagoon**, with **white-sand** beaches, crystal-clear waters, **exotic** plants and star-filled skies.

**It's uncrowded and unspoilt**, and life here moves at a **different pace**. 2,000 people live here, on five islands. There are few roads or cars. Yet the lagoon is busy with **colourful launches** ferrying **locals** to and fro, and taking visitors island-hopping and on excursions to see Scilly's **wonderful wildlife**.

There's **space and freedom**. And the **choice** to do a lot – or do next to nothing – in this spectacular setting.

People come specially to see basking sharks, puffins, seals, dolphins and rare birds. They sail, kayak, windsurf and fish, dive among wrecks, swim and wade between islands. They walk, cycle and ride horses along coastal paths, explore local history and archaeological sites, learn painting, photography or cooking, do yoga, take spa treatments, visit artists' studios and Treco's famous tropical gardens. They eat fresh seafood at stylish cafes and beach barbeques. They enjoy the **friendly** traditional pubs. They browse shops in the tiny capital Hugh Town. They picnic and beachcomb on beaches that are near-deserted, even in the height of summer. Or just sit and watch the tides, the sunsets and the stars.

Unforgettable **experiences** in a **simpler, kinder, more peaceful world**.

## Key words & phrases

***Like nowhere else in England, a world apart, very special, quite different***  
- Immediately sets it apart and gives a reason to visit. Also locates it as England (not Scotland or Sicily!)

***Outstandingly beautiful, uncrowded, unspoilt, different pace, colourful launches, space, freedom, choice*** – all worked well in research

***Cornwall*** - Locates Scilly, and links to popular brand

***Natural history, UK's mildest climate*** - Explaining the upcoming claims, so they are more credible (otherwise non-visitors reject as 'hype')

***Lagoon*** - conveys the closeness of the islands to each other and ease/safety of island-hopping – suggests tropical without using the word (which non-visitors reject as too far-fetched)

***Exotic*** - important word – but always associate with plants for credibility (otherwise non-visitors reject as far-fetched)

***Busy*** - Counteracting the 'nothing to do' fear

***Locals, friendly*** - A 'living community' that welcomes visitors – but NB unlike current visitors, potential new visitors are not strongly looking for the opportunity to feel part of the community

***Experiences*** - Clear reason to visit. People are looking for experiences.

***Simpler, kinder, more peaceful world*** - Idea of stepping back to a simpler time with traditional values, without connotations of it being old-fashioned. A different world – somewhere apart.

*NB The penultimate paragraph goes beyond the 'headline' story but is included because our non-visitor research showed a strong concern that there wouldn't be enough to do. Most of these activities were tested in research & had favourable responses. Some are included to reassure people that Scilly has some contemporary higher-end product.*



## 6 MARKETING PROGRAMME

### BACKGROUND

Scilly already has a programme of destination marketing comprising:

- ▶ PR including press trips
- ▶ annual brochure and themed print
- ▶ website with online advertising
- ▶ public holiday shows and trade fairs
- ▶ travel trade sales including work to attract cruise ships
- ▶ tactical advertising in Cornwall (mainly for day trips)
- ▶ and some social media.

These activities are managed by Island Marketing and the council's tourism team and delivered by partners and contracted agencies.

There is some very effective work happening, making good use of modest resources. The following recommendations aim to support and strengthen this marketing activity in the short term, not to replace it.

The longer-term aim should be to continuously review and update marketing activity in response to an indepth understanding of priority target markets. This greater understanding should clarify which channels to use to reach them, and which creative messages and tactics will convert them. So a strong market intelligence system - including primary research, trend-watching, and evaluation of marketing activities – is needed to inform marketing decisions. There is a (separate) Research Plan as part of this study.

## THE FOUNDATIONS

Scilly Tourism Partnership needs to:

- ▶ **Develop a single, integrated destination marketing programme** – even if delivery is outsourced to different people. Make sure that the single programme is developed with and shared with stakeholders.
- ▶ **Be single-minded about applying Scilly's Shared Story™** – so that the key messages about what makes Scilly special and different are loud and clear across all Scilly's destination marketing, and are carried further afield in other marketing by partners too. This means a programme of industry communications and engagement to encourage widespread and creative use of the Storyboard words, images and concepts – among tourism businesses, but also among Scilly's producers (food, flowers, arts & crafts, clothing, music etc).
- ▶ **Target the priority segments as tightly as possible** – avoid a scattergun 'something for everything' approach, and segment communications as much as possible. This means making sure that you really get under the skin of your targets and then make sure that the messages, tone of voice, creative treatment, visual images, marketing partners and routes to market are all relevant and appropriate to the specific target. You'll need to develop separate activities and approaches for different segments/niches – but all under the single integrated programme mentioned above.
- ▶ **Invest in exceptionally strong creative work** to achieve clear differentiation and 'cut through' in this crowded marketplace. The look and feel of your digital marketing and any print you produce should reflect the 'brand values' of the Shared Story™ – so, they should look and feel **like nowhere else** in England (eg images & colours but also design approach, format, tone, style), they should convey an authentic feel (eg featuring real stories about island life and using natural found objects and Scilly artists' work), they should suggest a simpler, unspoilt place (eg using facsimiles of old guides) and they should respond to your target customers' values & needs (eg with more of an information-rich 'handbook' feel, OS maps etc). This calls for a completely fresh creative approach and we recommend that you use the Storyboard and also some of the creative exercises from the Marketing Workshop (the 5 senses and the Only in Scilly stories) as part of any creative brief.

## THE SPECIFICS

Specifically, we recommend that Scilly Tourism Partnership:

In brief	Key elements:
<p>Updates Scilly's <b>digital marketing</b> – with a new website and much more emphasis on e-marketing and social media</p>	<ul style="list-style-type: none"> <li>▶ New website with specialist SEO (see below), high-quality differentiated creative design, highly searchable content, user-generated content, e-news sign-ups with 'killer questions' for CRM (see below), competitions, real-time availability, social media feeds (see below), extensive links to partners' information including blogs and webcams, sections in other languages, especially German and French.</li> <li>▶ Specialist SEO (search engine optimisation) to attract new visitors, to include: optimising key words that reflect the Shared Story™ and themes &amp; experiences potential visitors are likely to be searching on; pay per click advertising. Initial key words work would be part of new website development. Ongoing SEO and PPC work would be handled inhouse (or could be outsourced).</li> <li>▶ E-marketing – using CRM principles (see below), regular mailshots (segmented to key target markets &amp; niches) with offers and incentives that drive traffic to the new website and encourage sign-up to social media</li> <li>▶ Social media – very important tool for Scilly to reflect its authentic, characterful values &amp; different way of life – need to build capacity in this quickly – should work very closely with (&amp; learn with) other social networkers on the islands, especially Radio Scilly. Build on recent new Twitter activity: develop interaction; instigate a hashtag for everyone tweeting about Scilly (from on and off the islands) – then publicise via marketing media. Other channels: Facebook page; Flickr library; YouTube channel; themed aggregated blogs (compilation of blogs on specific themes eg creatives' blogs, wildlife experts on Scilly etc</li> </ul>

<p>Takes a fresh creative approach to <b>print</b> (brochures, leaflets, direct mail) to focus on targets and to make sure Scilly stands out as different and special</p>	<ul style="list-style-type: none"> <li>▶ A review of current destination print. Look for a creative alternative to the current brochure – which is attractive but very similar to other destinations, and is trying to reach too broad a target.</li> <li>▶ Short-term: use the Shared Story™, Storyboard, Marketing Workshop material (Senses &amp; Only in Scilly stories), and info re priority markets to inform creative approach to the 2012 brochure.</li> <li>▶ Medium-term: Work with industry to review brochure’s effectiveness and consider possible alternatives if needed – some initial ideas for exploration: a ‘directory’ of accommodation plus more targeted, tactical seasonal, activities or segment-specific inspirational print that drives traffic to the website; more extensive use of the Islander magazine for destination marketing; sponsored print in association with relevant branded products.</li> <li>▶ Look to develop a Scilly Handbook – a practical information-rich guide stuffed with insider knowledge, along the lines of the Rough Guides, Lonely Planet or Slow Travel Guides (jointly published by Bradt &amp; Sawday)</li> <li>▶ Develop better print for each of the main islands – to underline the differences and to encourage exploration and understanding.</li> </ul>
<p>Does more marketing with <b>partners</b> e.g. with Visit Cornwall and VisitEngland, as well as producers on Scilly itself</p>	<ul style="list-style-type: none"> <li>▶ Explore potential joint marketing opportunities with Visit Cornwall – especially travel trade and overseas marketing, editorial in VC’s 2012 brochure and in their regular monthly emails to their database of 110k, links to their social media and themed consumer campaigns that are appropriate for Scilly’s target markets e.g. VC’s new ‘in Style’ [working title] campaign, weddings and gardens campaigns, and dog-friendly campaign [in planning]</li> <li>▶ Raise Scilly’s profile with national destination marketers at VisitEngland and VisitBritain – through familiarisation visits, networking via social media, and face-to-face presentations to the marketing teams in London</li> <li>▶ Work hand-in-glove with Scilly’s producers – i.e. food, flowers, art, music, jewellery, clothing etc – on reciprocal marketing that builds the ‘Made in Scilly’ brand</li> </ul>

<p>Continues with - and develops - the destination <b>PR</b> work to gain national and international media coverage</p>	<ul style="list-style-type: none"> <li>▶ Use the Shared Story™ and targeting priority markets and niches</li> <li>▶ Develop a 'media room' on the new website</li> <li>▶ Run a session on 'how to make news' for providers on Scilly – to increase PR material</li> <li>▶ Use social media to reach journalists with PR stories that reflect the Shared Story™ messages</li> <li>▶ Buy into Visit Cornwall's overseas PR campaign in Germany</li> </ul>
<p>Develops a strategic <b>sales</b> approach to grow and exploit the <b>day visits</b> market</p>	<ul style="list-style-type: none"> <li>▶ Work with Visit Cornwall, individual operators in Cornwall and travel trade to grow and exploit the day visits market from Cornwall. Likely to include: Scilly featured in VC marketing materials, sales to travel trade currently selling Cornwall, familiarisation visits and incentives for specific Cornish providers (esp hoteliers). Plus tactical 'last-minute' sales via Cornish media &amp; social media.</li> <li>▶ The day trips themselves should include a Scilly sales pitch during the journey, improved options for how to spend the time while on Scilly (to maximise the experience – especially chance to sample off-islands), more opportunities to buy Scilly product/momentos, 'take-home' publicity, and data collection for follow-up CRM to turn them into future stayers</li> </ul>
<p>Adopts a rigorous approach to customer relationship management</p>	<ul style="list-style-type: none"> <li>▶ See Appendix 1</li> </ul>
<p>Sets up a Market Intelligence system</p>	<ul style="list-style-type: none"> <li>▶ See separate Research Plan</li> </ul>

# APPENDIX 1: CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

## IN A NUTSHELL

In a nutshell, CRM is a system that allows you to understand customers better so that you can engage with **new enquirers** to convert them to bookers, and with **current visitors** to encourage them to repeat.

Excellent CRM will mean you have better market intelligence to inform your marketing planning: you will know much more than you do now about your targets.

Your marketing messages will be much more likely to convert, as you will have collected their permission to contact them (that's why it you hear people refer to 'permission-based marketing'), you will know what is likely to interest them, and you should know how and when they would like to be targeted.

## TO SUCCEED

To succeed, Scilly Tourism Partnership will need:

- ▶ Detailed, accurate and up-to-date data about visitors and enquirers
- ▶ Permission from people on your database to hold their data and target them with marketing messages
- ▶ A database that allows you to segment communications, so that you can target people very accurately with the right messages
- ▶ A standardised approach to data capture agreed with your marketing partners – and reciprocal agreements with your marketing partners, to cross-sell to each other's databases (this requires opt-in boxes on all data capture to enable cross-selling)
- ▶ A system that allows new customers to input their own information.

## NEXT STEPS

Scilly Tourism Partnership will need to:

- ▶ Agree a list of ‘killer’ questions for all partners to ask enquirers & bookers from now on (see below)
- ▶ Make sure the new website specification includes excellent data capture and e-marketing capabilities
- ▶ Find out what data all partners currently hold
- ▶ Buy-in lists where needed
- ▶ Plan-in marketing activities to capture data e.g. competitions, newsletters
- ▶ Work with partners to integrate data capture into sales and booking processes
- ▶ Deliver a tightly targeted e-marketing programme – featuring tailored offers and news

### ‘Killer’ questions

<i>for quick sign up:</i>	<i>for more detailed sign-up:</i>
<ul style="list-style-type: none"> <li>▶ Name - to personalise communications</li> <li>▶ Email address - future marketing communications</li> <li>▶ Email Opt-in - for future e-marketing</li> <li>▶ Interests - for segmented communication</li> <li>▶ Source - to measure effectiveness</li> <li>▶ Postcode - to enable profiling</li> </ul>	<ul style="list-style-type: none"> <li>▶ Postal address - postcode for collective profiling information and address for direct mailing</li> <li>▶ Mail Opt-in - for future direct marketing</li> <li>▶ Visit date - for future anniversary booker communications</li> <li>▶ Date of Birth - demographic profile</li> <li>▶ Gender - ditto</li> </ul>

## APPENDIX 2: MORE ABOUT NICHES

### Activities / Theme Niches

- ▶ Luxury – high-end product / experiences
- ▶ Well-being – peace / tranquillity / retreat / spa / yoga
- ▶ Active – swimming, wading, kayaking, diving, coasteering, sailing, fishing
- ▶ Arts – painting, craft, photography
- ▶ Wildlife – star-gazing, bird-spotting, sealife, expert tours etc
- ▶ Gardens – Abbey Gardens Tresco – linked to Great Gardens of Cornwall

### Active Gen X-ers Niche

Scilly is keen to attract younger people – pre-/no-families among the Gen X-ers<sup>5</sup> who are settling down much later and have high disposable incomes to spend on travel . The rationale is to build markets for the future. This isn't a mainstream market for Scilly, and Scilly is unlikely to appeal to them simply as a 'must-see' destination. But Gen-Xers select holidays as much by activity as destination (they will start with an activity in mind and then search for what's on offer across the world). So there may be potential to attract a niche of active Gen X-ers with 'cool', different physical activities such as inter-island wading and swimming, Scilly-scale coasteering, diving on wrecks, seawater kayaking, gig rowing etc. Scilly's 'green' offer, non-commercial atmosphere & simple lifestyle could also appeal. Early adopters should like the idea of somewhere that's off their peer group's radar. The SLAC (Scilly Lowtide Adventure Challenge) event taking place for the first time this autumn is an excellent starting point and provides good PR for positioning Scilly with this niche segment.

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<sup>5</sup> Generation X or Gen-X refers to the generation after the baby boomers. The age range is elastic, but it usually means people born between the mid 1960s and the late 1970s.



### Slow Travel

The Slow Movement – which promotes slowing down in every area of life - is growing, and Slow Travel is part of that. Market research analysts Mintel have identified that there are 5.6 million UK adults who can be classed as “slow travel enthusiasts”. Mintel says: “Slow Travel is not defined by the mode of travel or the destination, but instead, the way the tourist approaches that travel. It is about physically slowing down to enjoy what is on offer, engaging with the local environment and fitting into local life.” Scilly could be positioned as an alternative, non-long-haul “exotic” destination for Slow Travellers.

Scilly might investigate Slow accreditation as a destination (Ludlow is the UK’s first Slow Town), using the Slow theme in destination marketing materials, and also the potential for a Slow Travel guide in the series being published by Bradt & Sawday (see our print recommendations in Section 6).

The Scilly experiences likely to appeal to this niche are: sleeper + ferry transport option, travel on the islands without cars, self-catering accommodation, green-accredited businesses, local produce and local festivals.

### Single women and women on holidays together

A growing proportion of the population is single in middle age. Scilly stakeholders report that women travelling alone feel comfortable and safe on Scilly. So this could be a fruitful niche. There are specialist tour operators who offer small-group singles holidays who may be interested in adding Scilly to their offer.

Increasingly people take multiple-holidays and short-breaks throughout the year this includes independent groups of women friends travelling together, perhaps on a school or college reunion. Feeling comfortable and safe are likely to be important considerations when choosing a destination for many of these women too. So profiling Scilly in publications – and with associations – with a strong female following might be valuable.

### Weddings / honeymoons

A huge amount is spent every year on weddings and honeymoons, and many are looking for special and different locations. There are clear routes to market via specialist media (magazines and websites), tie-ins with products and service providers including professional wedding planners, and via wedding fairs. This is an important niche for Cornwall, and there may an opportunity for Scilly to work with Cornwall to reach this market. Scilly businesses will need to offer a range of unique and highly differentiated experiences to be compelling enough, in this very competitive market.

### Visiting Yachts

Scilly is a popular destination for private yachts, including many from France and Ireland. It offers a fantastic marine environment and an exciting challenge for experienced sailors. These are predominately middle-aged, well-off visitors who will spend money on land but will expect a quality product. Moorings in Scilly are not at capacity, particularly off-season, but the catering and retail outlets will need to be open to attract those off-peak visitors.

Word-of-mouth is very influential in yachting circles but there should be good, multi-lingual web-based information on facilities in Scilly, including very practical information about moorings, channels, tides etc as well as the wider product offer. Yachting publications (such as Yachts and Yachting and Yachting Monthly) and websites could be targeted through PR activity.

### Visiting Cruise Ships

A growing and successful niche activity that currently brings 40+ cruise ships to the islands – working via Destination South West. More Scilly businesses may need advice and support to make sure that they take full advantage of this business. Cruise operators like to have a packaged excursion to sell to their passengers.

Many of the smaller round-Britain cruises are themed cruises e.g. gardens, wildlife – themes for which Scilly has a great deal to offer. These specialist cruises often include on-ship experts as well as wanting specialist talks at the places they visit.

As with other day visitors, Scilly should be offering an exceptional and fascinating experience, leave visitors with ‘take homes’ that will persuade them to re-visit as staying visitors, and if possible collect customer data for CRM purposes.

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