

CAPE COD CHAMBER OF COMMERCE

TOWN OF BARNSTABLE *Strategic Recommendation*

February 26, 2019



NAIL

Agenda

1. Overview
2. Key Learnings
3. Avenues We Considered
4. Strategic Recommendation

Overview

What bring us together today?

The Town of Barnstable is looking for assistance on two fronts:

1. LIVE - Residents

2. WORK - Business Attraction

3. PLAY - Tourism

Our deliverables

Today

Research analysis and strategic recommendation.

Tomorrow

Mission statement and creative recommendation.

Methods of Learning

- Kick-off meeting with CCCC team
- Primary research - interviews with Barnstable stakeholders
- Primary research - qualitative and quantitative surveys
- Review of brand, positioning, identity and collateral
- Competitive marketplace observational research
- Barnstable experience - site visit

Surveys

Qualitative Survey

Question type: open-ended

Respondents: 186

Criteria: New England residents; screened out Cape residents.

Quantitative Survey

Question type: mostly multiple-choice, some open-ended.

Respondents: 437

Criteria: New England residents; screened out Cape residents.

Our Roles

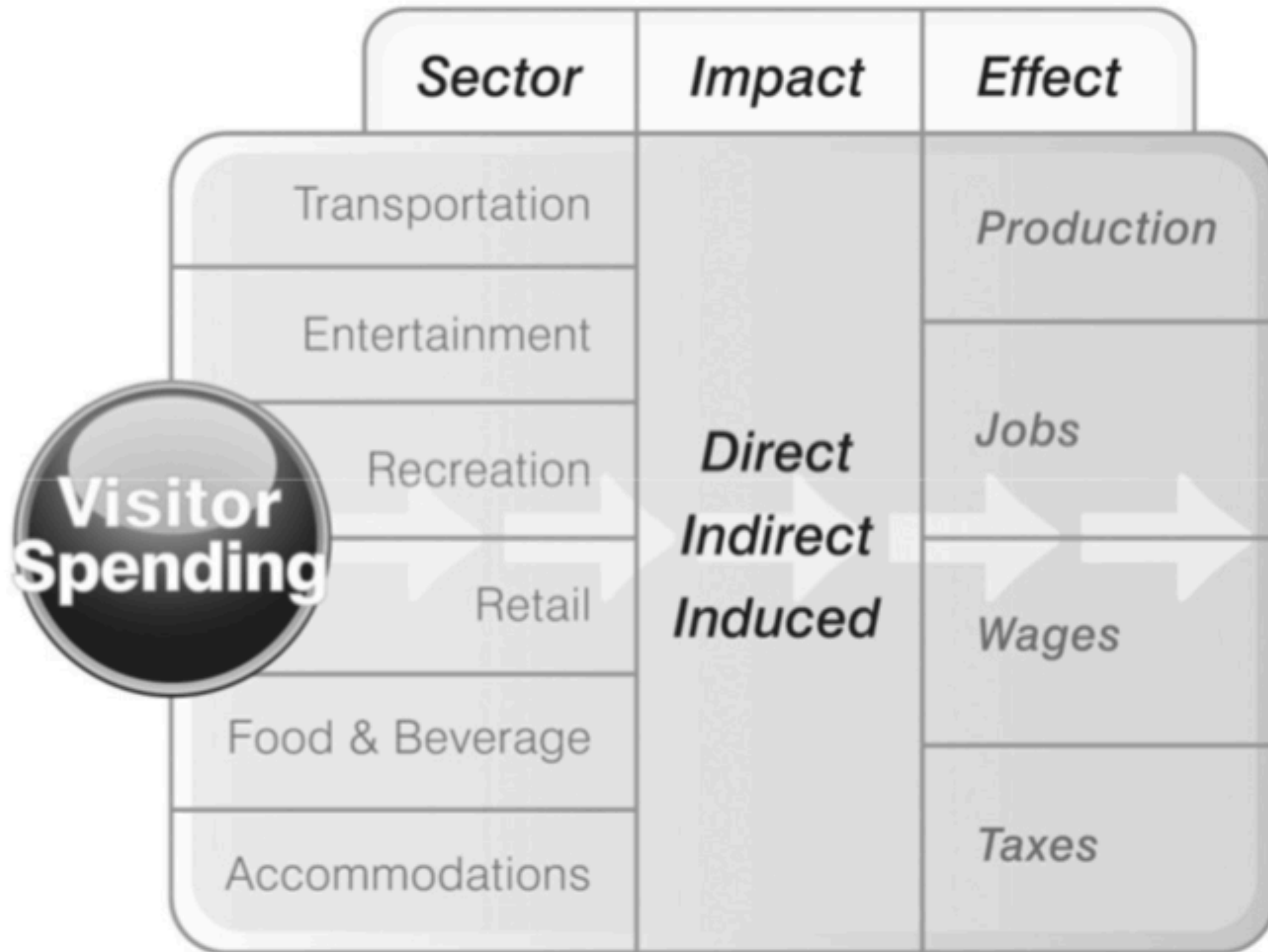
You are the experts on Barnstable.

We are the fresh perspective.

Challenges

Challenge 1

How do we reconcile the needs of live, work, and play?



Tourism marketing attracts visitors and their money.

But it also shapes the image of a region. Tourism marketing is the strongest, most visible projection of your identity. It plays a significant part in driving visitation and economic development.

It's also overheard by potential residents and business owners and drives visitation.

Once you incite visitation, there is uplift in how your destination is judged as it relates to being:

- *a good place to live*
- *a good place to start a career*
- *a good place to start a business*
- *a good place to purchase a vacation home*
- *a good place to retire.*

Tourism marketing produces a ***halo effect***.

Tourism marketing is ***destination branding*** for every purpose.

Challenge 2

Hyannis vs Barnstable

Q: What towns in Cape Cod can you name off the top of your head? Please list.

Provincetown: **41%**

Hyannis: **37%**

Falmouth: **27%**

Yarmouth: **18%**

Sandwich: **18%**

Chatham: **17%**

Dennis: **13%**

Barnstable: **12%**

Plymouth: **12%**

Nantucket: **11%**

Truro: **9%**

Wellfleet: **9%**

Orleans: **8%**

Mashpee: **8%**



Barnstable is not enjoy the awareness levels that Hyannis does..

Q: What towns in Cape Cod can you name off the top of your head? Please list.

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Orleans: **8%**

Mashpee: **8%**

“Barnstable is not a recognizable name. It has 3 different meanings. Hyannis is the most recognizable name outside of the local geography that isn’t just saying “Cape Cod.” (business owner)

Interview Quotes

Internal Perceptions

“Hyannis has some drug and crime issues.” (business owner)

“It has a bit of a stigma. There’s bad some bad crime on main street in Hyannis. Some parts are ticky-taffy. But it has everything you need to live. Lots of amenities.” (resident)

“Hyannis doesn’t have a very good reputation because it’s more transient. Crime is everywhere. Most people don’t want to be there.” (realtor)

Survey Excerpts

External Perceptions - 437 respondents

Q: What associations come to mind when you think of Hyannis?

Sample answers of different themes:

- *The beach and the calm waves of the ocean.*
- *The Kennedy's, upscale, private beaches.*
- *small beaches, tourist stores*
- *It,s probably the Hub, or the biggest town and port.*
- *just like cute shops and beach houses*
- *Rich people, large mansions, clam chowder, lobsters*
- *Nightlife*
- *the Kennedys*
- *shopping on the main street*
- *Kennedys, boats, the ferry*
- *It has a lot of beaches and you can take the ferry to Nantucket from there.*
- *The only thing I know about Hyannis is that it is easier to get to then other place since the train runs there.*
- *Great golfing area from what I have been told.*
- *Summer vacations with my family growing up.*
- *port authority, fine dining, conference center, culture,airport, JFK/Kennedy compound, ferries*

**We fed all the raw data into software
to produce a word cloud.**

Interview Quotes:

“Nobody pumps up Hyannis. You have all these good things...golf, symphonies, the theater... at some point it becomes a self-fulfilling prophecy.” (town councilor)

Worst thing is the perception people have. Both insiders and outsiders have negative perceptions. People are feeding into it...people latch onto them. Even business owners on main street glorify Chatham and Falmouth. (business owner)

Hyannis is imperfect, but it does have many redeeming qualities. Yet there appear to be many in Barnstable who really get DOWN on it. And if that's happening at the sort of scale that these conversations suggest, the town will continue to have problems. It needs more champions. Especially in light of the fact that the outside perception of its struggles is not nearly as bad as we've long believed.



There are instances where communities have completely renamed certain neighborhoods or districts in order to quickly manufacture a certain destination brand image.

Good examples are Wynwood in Florida. And the South of Washington, or SOWA neighborhood of Boston. Sowa is a trend art and design area, and wynwood is this hip neighborhood of miami with a strong street art scene.

There are significant community development and branding efforts that went into the creation of each of these. It's a big investment.

Interview Quote:

“The US Highway system was trying to change the exit numbers...when they did it in the Cape, the town went crazy. People were so invested in not having the name of the exit change. People will protest almost anything that’s different. Even if it’s positive. They don’t like change.” (business owner)

Repackaging Barnstable’s identity in a similar fashion is not recommended because it would be too radical a departure for the community.

Challenge 3

Market Context

We are competing not only with other vacation destinations.



We are competing not only with other vacation destinations.

We are also competing with other regions on the Cape.



Bass River Beach
YARMOUTH



8
SAVES



Chatham Light Beach
CHATHAM



96
SAVES



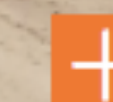
Highland Golf Links
NORTH TRURO



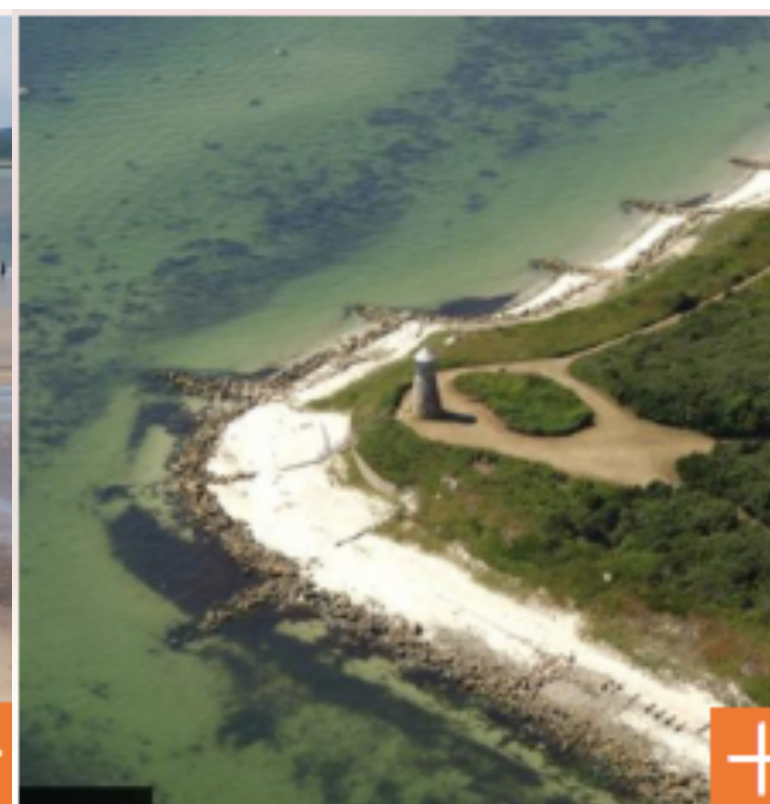
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SAVES



First Encounter Beach
EASTHAM



14
SAVES



Point Gammon Light
SOUTH YARMOUTH



39
SAVES



Marconi Beach (National Seashore)
WELLFLEET



10
SAVES

Implication for Messaging Strategy

The step BEFORE someone decides on coming to Barnstable, they aren't thinking "do I want to go Barnstable...or do I want to the Grand Canyon, or Las Vegas, or Nashville."

Before they choose Barnstable, they've already decided on the TYPE of vacation (maybe a beach trip), and now they're looking at their available options.



Bass River Beach
YARMOUTH



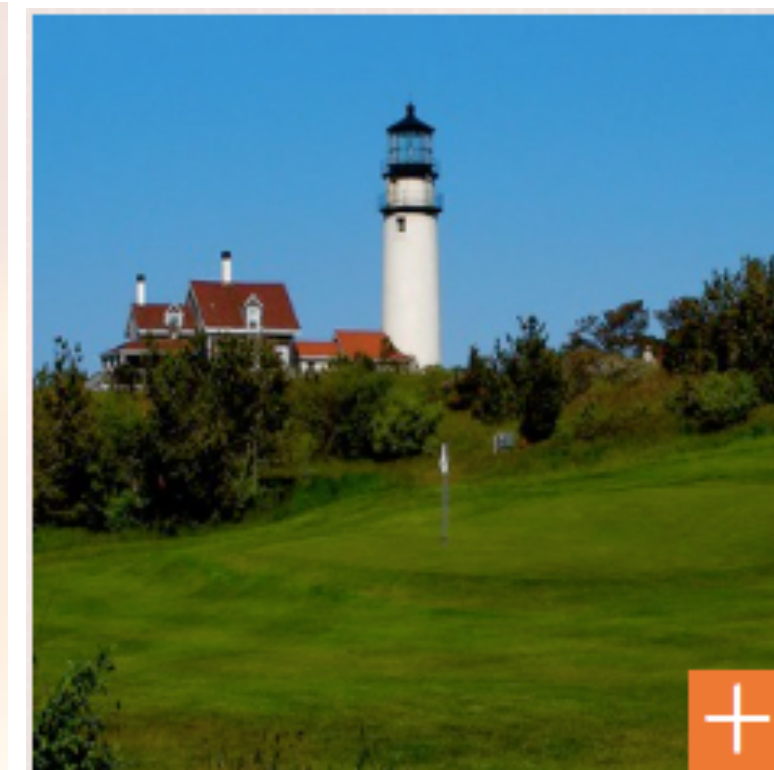
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Chatham Light Beach
CHATHAM



96 SAVES



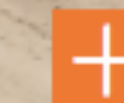
Highland Golf Links
NORTH TRURO



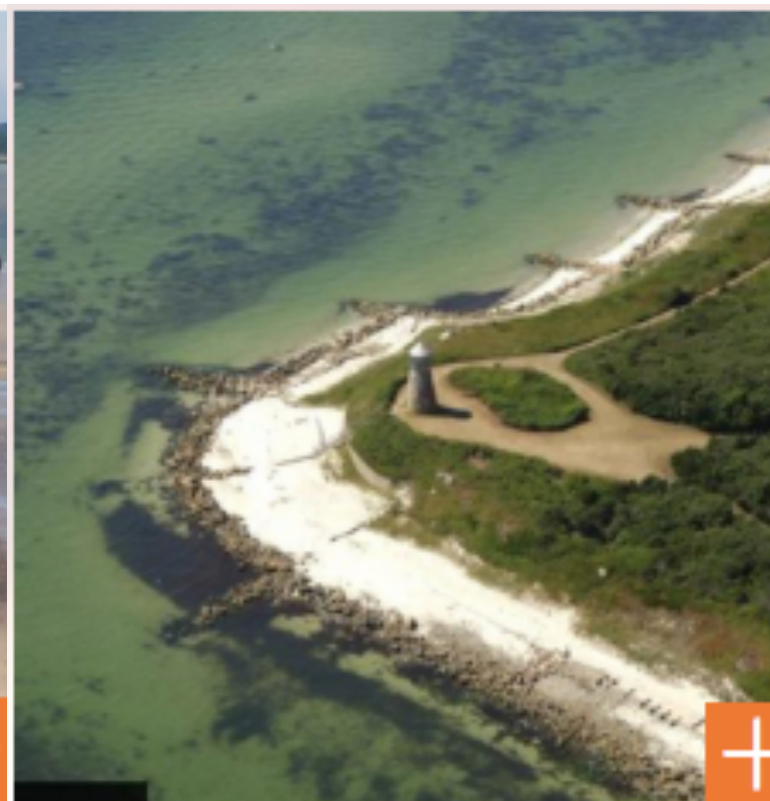
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First Encounter Beach
EASTHAM



14 SAVES



Point Gammon Light
SOUTH YARMOUTH



39 SAVES



Marconi Beach (National Seashore)
WELLFLEET



10 SAVES

Implication for Messaging Strategy

- differentiate ourselves from our neighbors by finding something that none of them can say.
- take some attribute that is potentially shared by others, but own it, and say it the loudest and most compellingly.



Bass River Beach
YARMOUTH



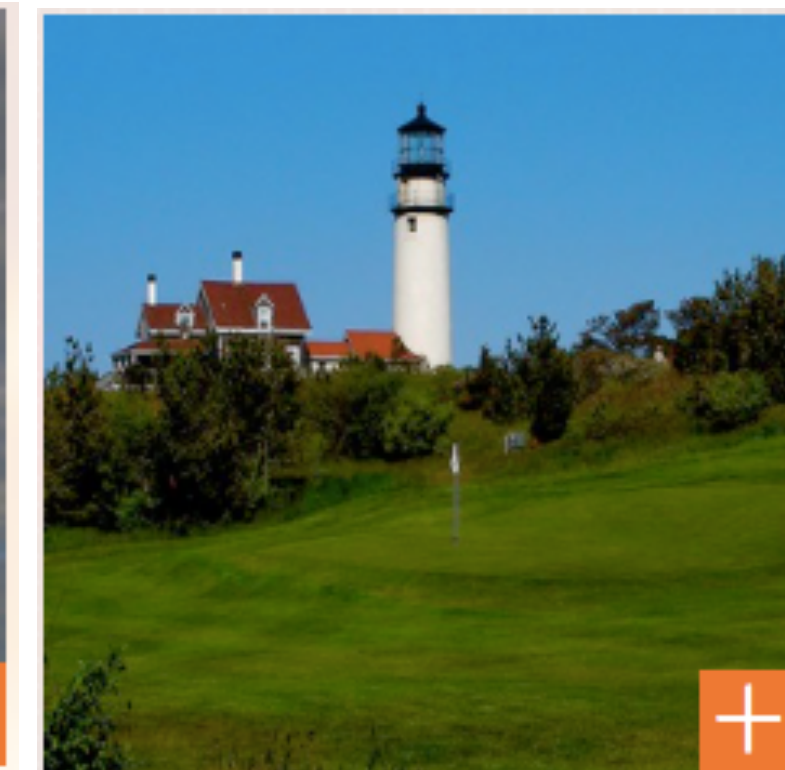
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Chatham Light Beach
CHATHAM



96
SAVES



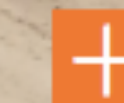
Highland Golf Links
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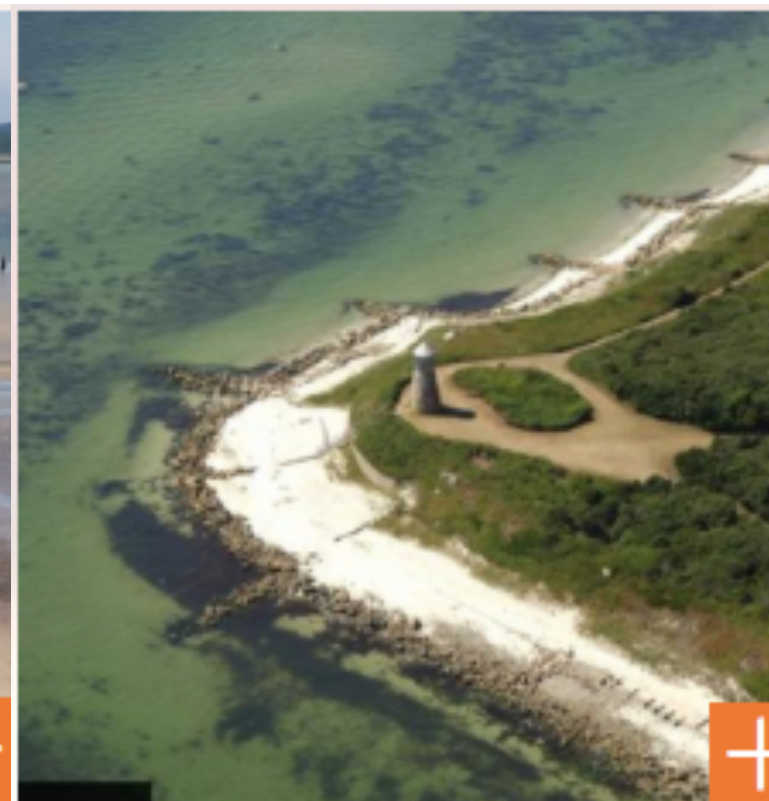
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SAVES



First Encounter Beach
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Marconi Beach (National Seashore)
WELLFLEET



10
SAVES

Challenge 4

Where is the opportunity to create growth and meaning?

Interview Excerpts

“It would be great to get some younger people on the Cape” (business)

“My clients are usually older folks...50 plus” (realtor)

“It’s less young families. And less young people generally. It’s an affordability thing. It’s viable for the older generation....demographics are older, which comes with it’s own set of challenges” (realtor)

CONSUMER TRAVEL INFO

MILLENNIALS

18-34 years old

BABY BOOMERS+

55+ years old

Average spend

\$2,915

\$8,736

Time

Not enough time

Unhindered by time

Travel companions

Independent/couple

Family and friends

Price

Price sensitive

Cost not a deal breaker

Why they travel

Looking for unique experiences and personal transformation

Looking for fun, to cross places off bucket-list, to see new things, and to relax

Media use

Mobile and websites

Email, off-line, and mainstream

Over-index

Health and nutrition

Different generations have different mindsets about travel.

Millennials want transformational experiences.

Boomers want rest and relaxation. (which the Cape delivers.)

However, the millennial generation is splitting...

Different life stages can dramatically impact behavior

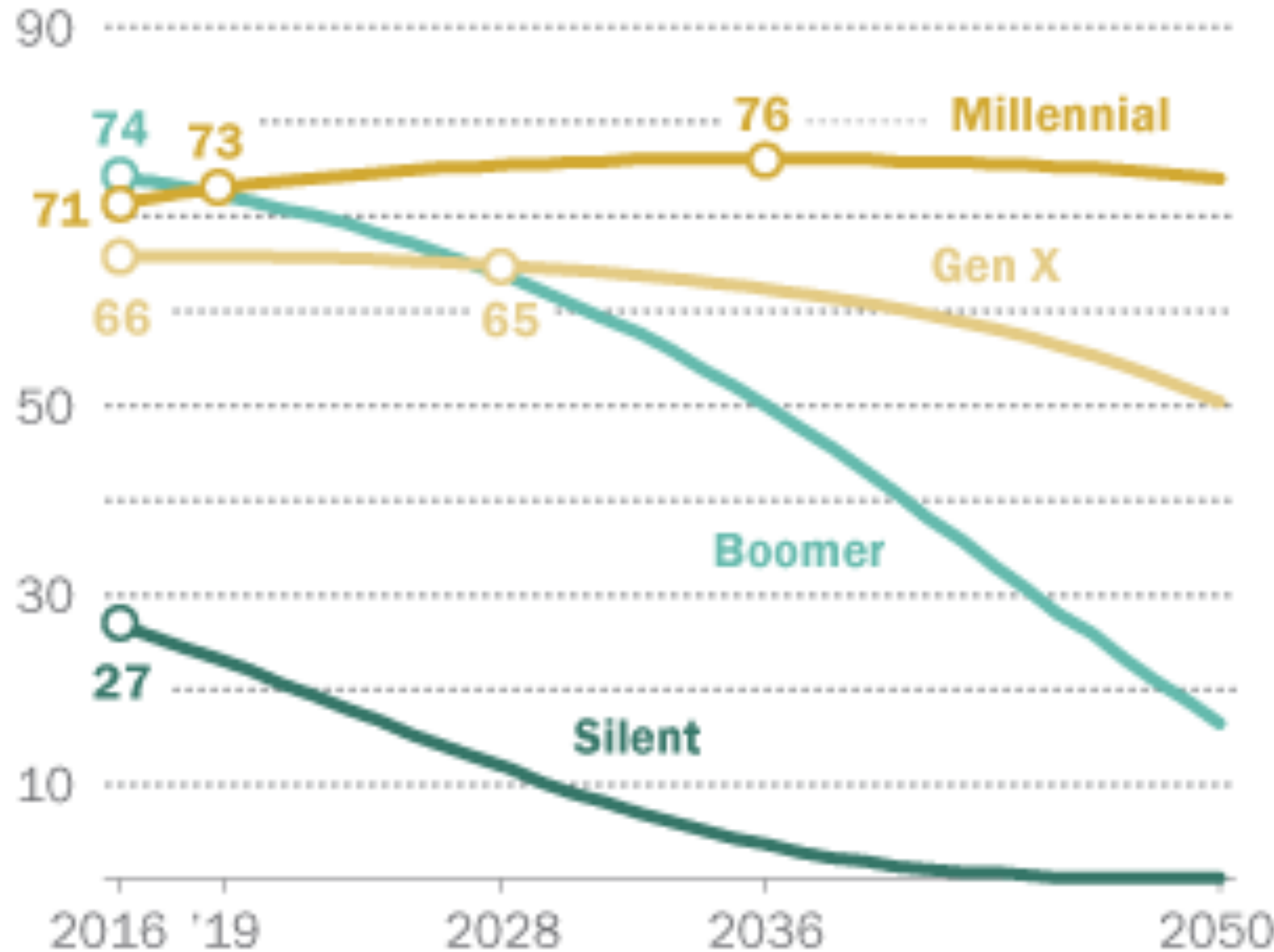
- **Older millennials** are driven by enjoying life's pleasures
- **Younger millennials** are driven by living a life full of excitement, novelties and challenges.

The oldest millennials are 37 now. They have young families. Or are starting them. Your mindset and needs change when you have kids and responsibilities.

Millennials also just surpassed Boomers in terms of population. Their spending power will soon be one of the largest in our economy.

Projected population by generation

In millions



The generations defined

The Millennial generation

Born: 1981 to 1996
Age of adults in 2016: 20 to 35

Generation X

Born: 1965 to 1980
Age in 2016: 36 to 51

The Baby Boom generation

Born: 1946 to 1964
Age in 2016: 52 to 70

The Silent Generation

Born: 1928 to 1945
Age in 2016: 71 to 88

The Greatest Generation

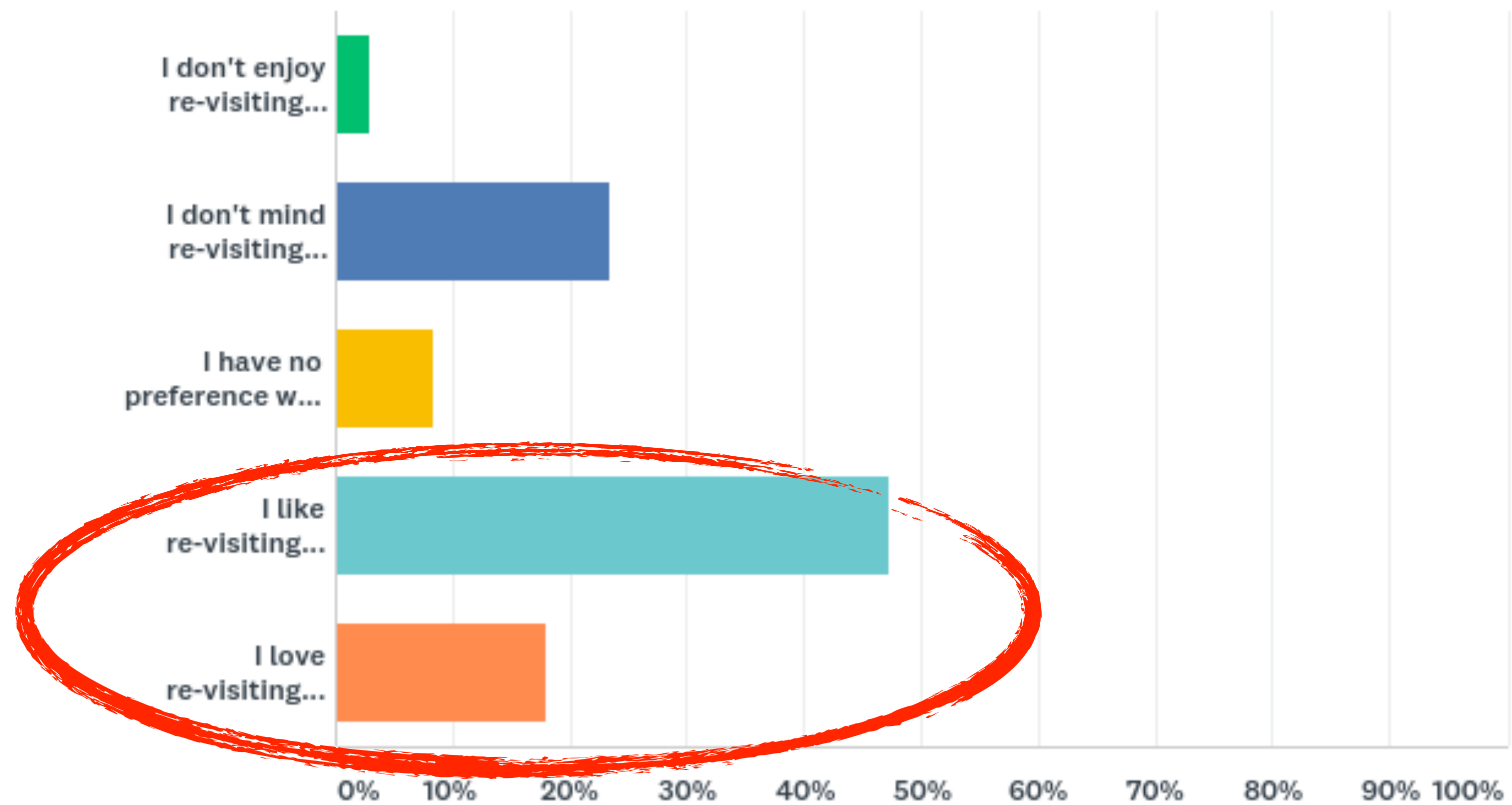
Born: 1901 to 1927
Age in 2016: 89 to 115

PEW RESEARCH CENTER

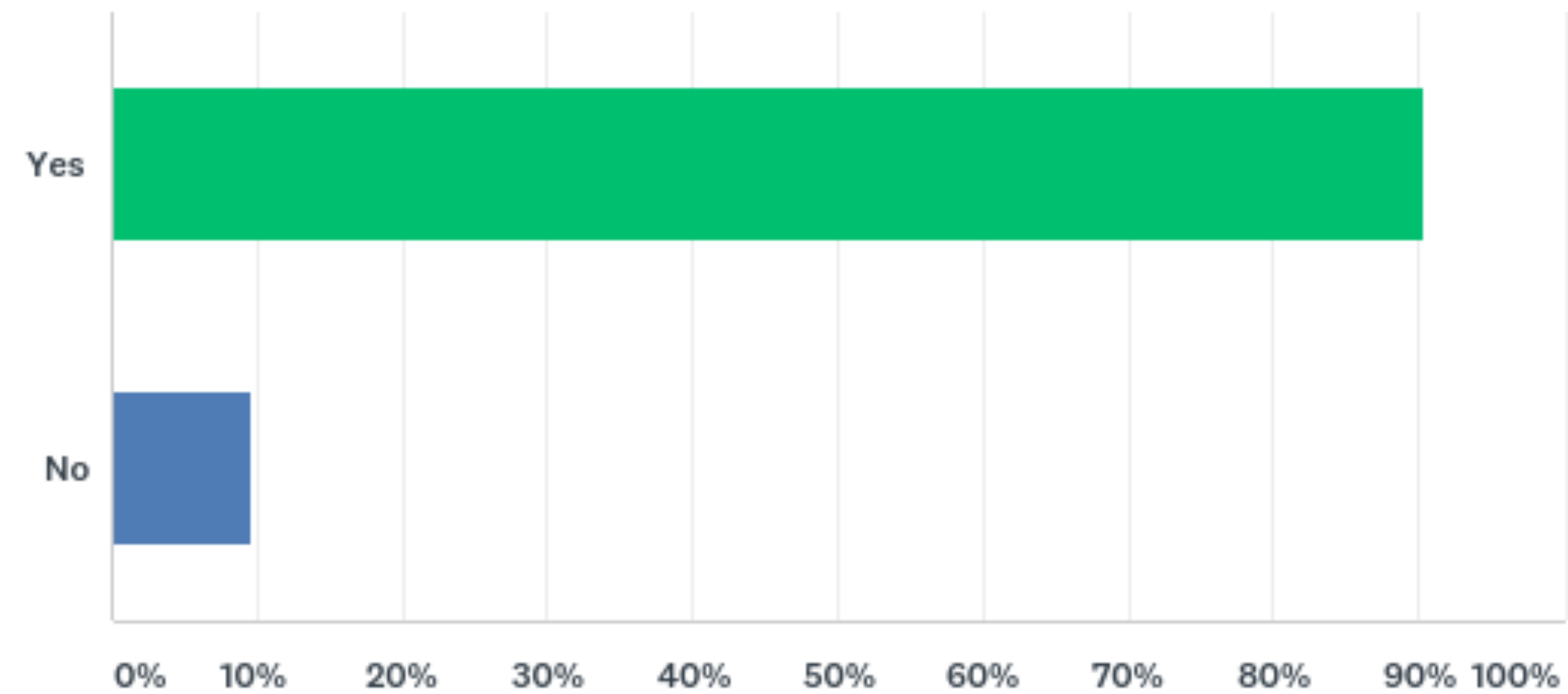
Source: [Pew Research Center](#)

Key Learnings

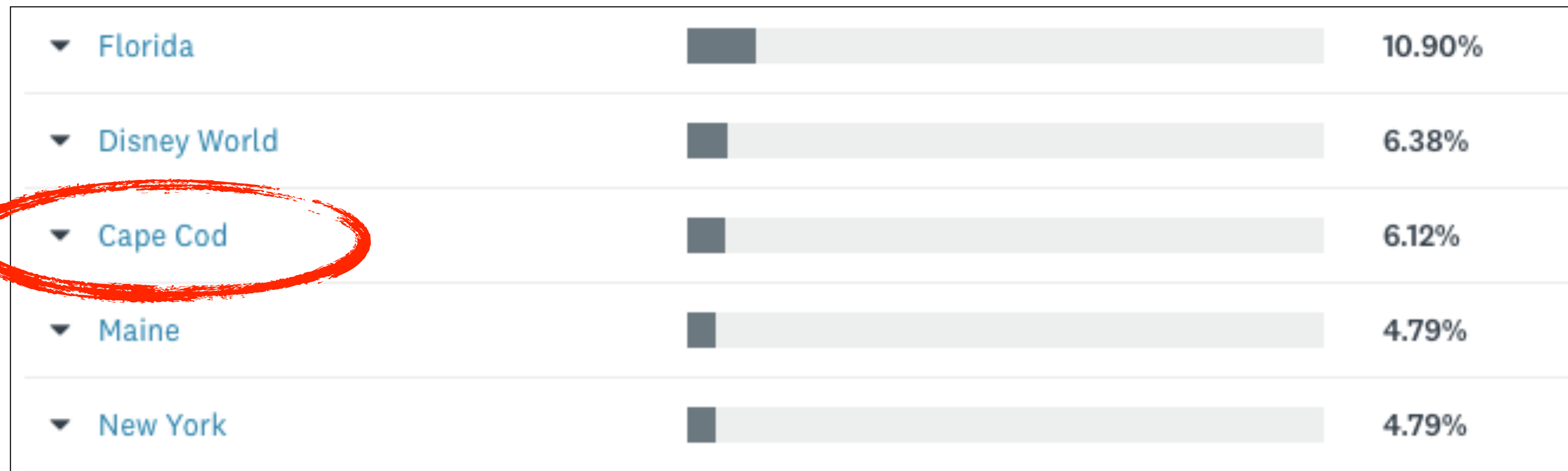
Q: How much do you enjoy re-visiting places that you've been before on vacation?



Q: Have you ever gone to the same destination more than once for a vacation?



Q: If you have gone to a place more than once on vacation, where have you gone?

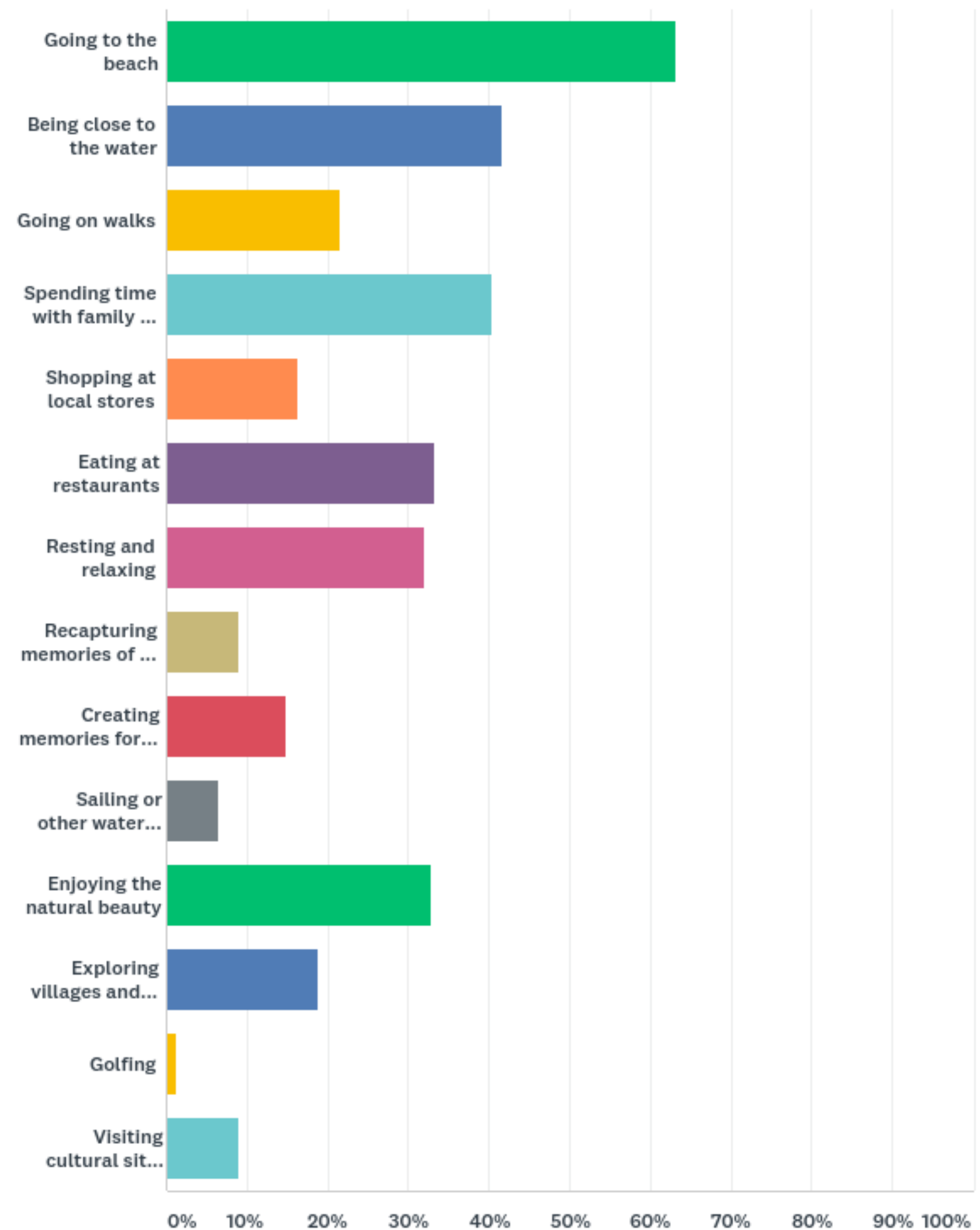


In many product categories, people are driven by novelty and newness.

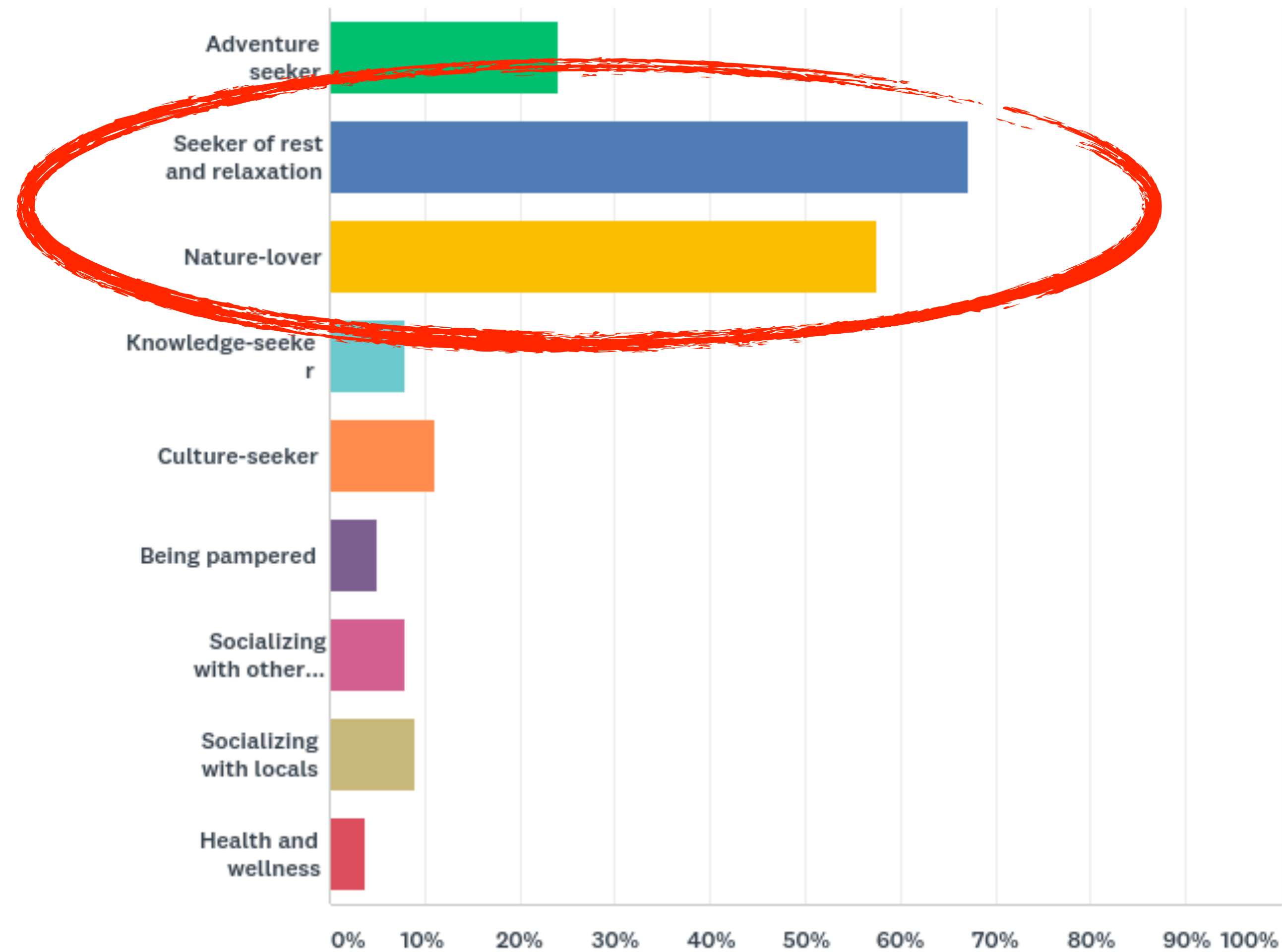
However, vacation planning is a *high involvement, high risk* decision.

Familiar choices are safe choices.

Q: Why do you enjoy going to Cape Cod? Select no more than three from the options below.



Q: What type of Cape Cod vacationer are you? Please select only 2.





But many places have these qualities.

So why the Cape?

1. *Cape Cod, MA*
2. *Laguna Beach, CA*
3. *Sanibel & Captiva islands, FL*
4. *Outer Banks, NC*
5. *Cannon Beach, OR*
6. *The Hamptons, NY*
7. *Maui, HI*
8. *Newport, RI*
9. *Gulf Shores, AL*
10. *Hilton Head Island, SC*

[Islands.com - 10 Best Beach Vacation Destinations](#)

Q: If you enjoy visiting a vacation destination more than once, please tell us why or why not.

A sample of themes that emerged.

Sample quotes:

“more to discover each time. miss stuff. more added.”

“nostalgia, relive old memories”

“share with people you love”

“comfort and belonging”

“it’s a tradition (only place I go to repeatedly)”

“not as much risk, as with a new place”

“familiarity.”

But one strong theme emerged...

Q: If you enjoy visiting a vacation destination more than once, please tell us why or why not.

“I went there as a child each summer and enjoyed taking my children there.”

“My parents used to take us to the Jersey shore every summer. It became a yearly tradition and something we looked forward to. We loved visiting the same places year after year and seeing how things changed. Now we bring our kids every year.”

“If I have good memories of a vacation, I love to go back to that spot and see the same things I enjoyed the first time and also some new things that I did not get to the first time.”

“I remember visiting Ocean City when I was a child with my family. Those trips were filled with happy memories and it was something I wanted to share with my husband and our children. The first time we went my husband very much enjoyed the trip and there were a lot of different things to do for both just our parent selves and as a family, that it has been a return family destination for us. My family also lives within two hours of Ocean City, so childcare while on vacation hasn't been an issue.”

“I have fond family memories . I have favorite places I like to go, and love showing them to new people.”

“There is so much to do and see and it brings back great memories .”

“Because is beautiful and I have made good memories there.”

“Visiting more than once gives you an opportunity to relive memories and explore places you did not get a chance to see the first time you were there.”

Q: If you enjoy visiting a vacation destination more than once, please tell us why or why not.

“Visiting more than once gives you an opportunity to relive memories and explore places you did not get a chance to see the first time you were there.”

“If it was a special vacation with a loved one, it brings back memories.”

“Enjoyed the place, location, nostalgia for past enjoyment, making memories, know that there’s not as much risk as with a new place, convenient, well priced.”

“I enjoy visiting more than once to relive the memories, experience more than what I could in one short trip, and to share a destination I enjoy with as many people as possible.”

“It brings back great memories while adding new ones. There’s always more to see and do than can fit into one trip. There’s a sense of coming “home” when you visit a familiar place.”

“I like visiting the same place more than once when it holds certain memories for me and when it’s a tradition to go there. However, if I’m traveling internationally, I prefer to go to different places.”

“Because I form a bond with places I visit, and I like to go back and visit to relive the memories.”

“I enjoy it because it has memories associated with it. Usually its a place where I wouldn’t get bored with repeating activities, but look forward to experiencing the unique place again.”

Interview Excerpts:

“My wife wanted to live there because she enjoyed the area growing up.” (resident)

“Many people who come to buy a second home came here as a child. That’s where their memories are.” (realtor)

“I used to come here [Hyannis] as a kid.” (business owner)

We need to understand the attributes driving destination choice.

And we need to *sell the benefit*. Not the features.

The pursuit of reliving old memories, or creating new ones is a powerful driver that currently happens naturally.

Avenues We Considered

Barnstable is made up of many villages.
And we're serving the needs of many people.
So there is nothing we can say that will be unilaterally true for everyone.
The best way to think about this is what is **the least wrong thing we can say**.

We don't have the budget to do complicated storytelling. A complicated, nuanced story requires many things to help tell that story, like videos and print ads. And you need to be in front of people a lot so that they have a chance to hear all the parts of that story. For that reason, our messaging needs to be **brutally simple**.

Theme 1

Key Strategic Positioning

The prosperity and emotional well-being of Hyannis and Surrounding Villages are fed by their wealth of water access and resources.

Potential Language

Nourished By Water

Supportive Points:

- Ties into the “Blue Economy.”
- Makes use of both the ocean and fresh water.
- Taps a physiological benefit and consumer need.
- Water shapes things.

“It’s the natural environment, there’s something special here. All the bodies of water, not just the ocean. I walk outside every day and I’m struck by the beauty ever single day. It doesn’t get old. That’s what brings people here.” (business owner)

“There’s something in the nature of our relationship with water. And not just the ocean. Also ponds and fresh water. Most people love it, appreciate it, and want to be around it. Hardly a person who would say it doesn’t matter. It’s the enormity of mother nature.” (realtor)

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Why We Rejected It

**Not sufficiently
differentiating enough against
other area competitors.**

Theme 2

Key Strategic Positioning

Hyannis and Surrounding Villages is a place of natural beauty with plenty to do for everyone, regardless of the time of year.

Potential Language

A Town for All Seasons

Supportive Points:

- Growth opportunity: “shoulder season”
- Truth - Barnstable can claim this more than other Cape regions.
- Duality - “All Seasons” can touch on nostalgia and future memories

Theme 2

Key Strategic Positioning

Hyannis and Surrounding Villages is a place of natural beauty with plenty to do regardless of the time of year.

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Supportive Points:

- Growth opportunity: “shoulder season”
- Truth - Barnstable can claim this more than other Cape regions.
- Duality - “All Seasons” can touch on nostalgia and future memories

Why We Rejected It

The economic activity generated during the summer is crucial. We would have to invest heavily in this campaign to deliver enough off-season results that offset anything we might lose during the summer.

Theme 3

Key Strategic Positioning

Each of Barnstable's villages have some something unique to offer, and the eclectic make-up of the town ensures that no trip has to be the same as the one before.

Potential Language

Different Every Time

Supportive Points:

- Put a spotlight on the villages.
- People revisit destinations to find what's new.
- Encourage repeat visits.
- Position ourselves as having a critical mass of culture and activities, something that other Cape areas would find difficult to match.

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Potential Language

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Supportive Points:

- Put a spotlight on the villages.
- People revisit destinations to find what's new.
- Encourage repeat visits.
- Position ourselves as having a critical mass of culture and activities, something that other Cape areas would find difficult to match.

Why We Rejected It

We know from our interviews that internal stakeholders are resistant to change. Also, people find comfort in the familiar and their old memories. Some changes that have happened have not been for the best.

Recommendation

This is a narrow, deep direction that we could build a branding campaign around.

It is true, creates context that is favorable for storytelling about life, business, and visits to Barnstable, speaks a language that will resonate with our audience, and positions ourselves competitively against our neighbors.

Recommendation

Key Strategic Positioning:

Hyannis and Surrounding Villages are at the physical heart of the Cape and the emotional heart of history and traditions.

Potential Language

The Center of Great Memories

Supportive Points:

- Uses physical location as a major point of differentiation.
- Taps the power of nostalgia and desire to share experiences.
- Serves a core need for people revisiting.
- Satisfies residents who are proud of their homes timelessness.
- Invite people to become part of that rich history.
- Honor the past, present, and future all at once.

Developing, marketing and sharing stories is critically important to travel destination campaigns. How it works for travel and tourism:

- We share stories. A 2012 Philippines CVB storytelling campaign that invited consumers to share their own stories online went viral in just days.
- Story-sharing develops brand ambassadors. Tourism Australia used this method to become the most popular destination page on Facebook with 4 million fans in a 2011-2013 campaign.
- We listen to stories in making our travel decisions. Ninety-two percent of people using social media to plan their vacation trust their friends' and followers' recommendations over ads.

Thank you.

NAIL

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Appendix

Survey Overview

Interviews

Interviewees

2 - Realtors

4 - Business Owners

4 - Residents

1 - Town Councilor

Qualitative Survey

Survey Questions

Qualitative

QUESTION 1

What associations come to mind when you think of Cape Cod?

QUESTION 2

List some of the places you've been to for a summertime vacation during the past 2 years.

QUESTION 3

Pick one of the places above, and explain what made it an appealing choice.

QUESTION 4

Describe your vacation planning process. Where do you start planning and how do you narrow down your destination choices?

QUESTION 5

Have you ever been to Cape Cod for vacation?

QUESTION 6

Why haven't you been on vacation to Cape Cod? (Skip question if you have visited.)

QUESTION 7

What towns on Cape Cod are you familiar with?

QUESTION 8

If you were to travel to Cape Cod this summer, describe what your ideal trip would look like.

QUESTION 9

Have you heard of Barnstable?

QUESTION 10

What associations come to mind when you think of Barnstable?

QUESTION 11

Have you heard of Hyannis?

QUESTION 12

What associations come to mind when you think of Hyannis?

QUESTION 13

Would you consider traveling to Cape Cod in the fall, winter, or spring? Why or why not?

QUESTION 14

What is your income?

QUESTION 15

What is your age?

QUESTION 16

What is your area code?

QUESTION 17

How many people usually travel on vacation with you? (Including yourself)

QUESTION 18

Are you the decision maker in your household for vacations?

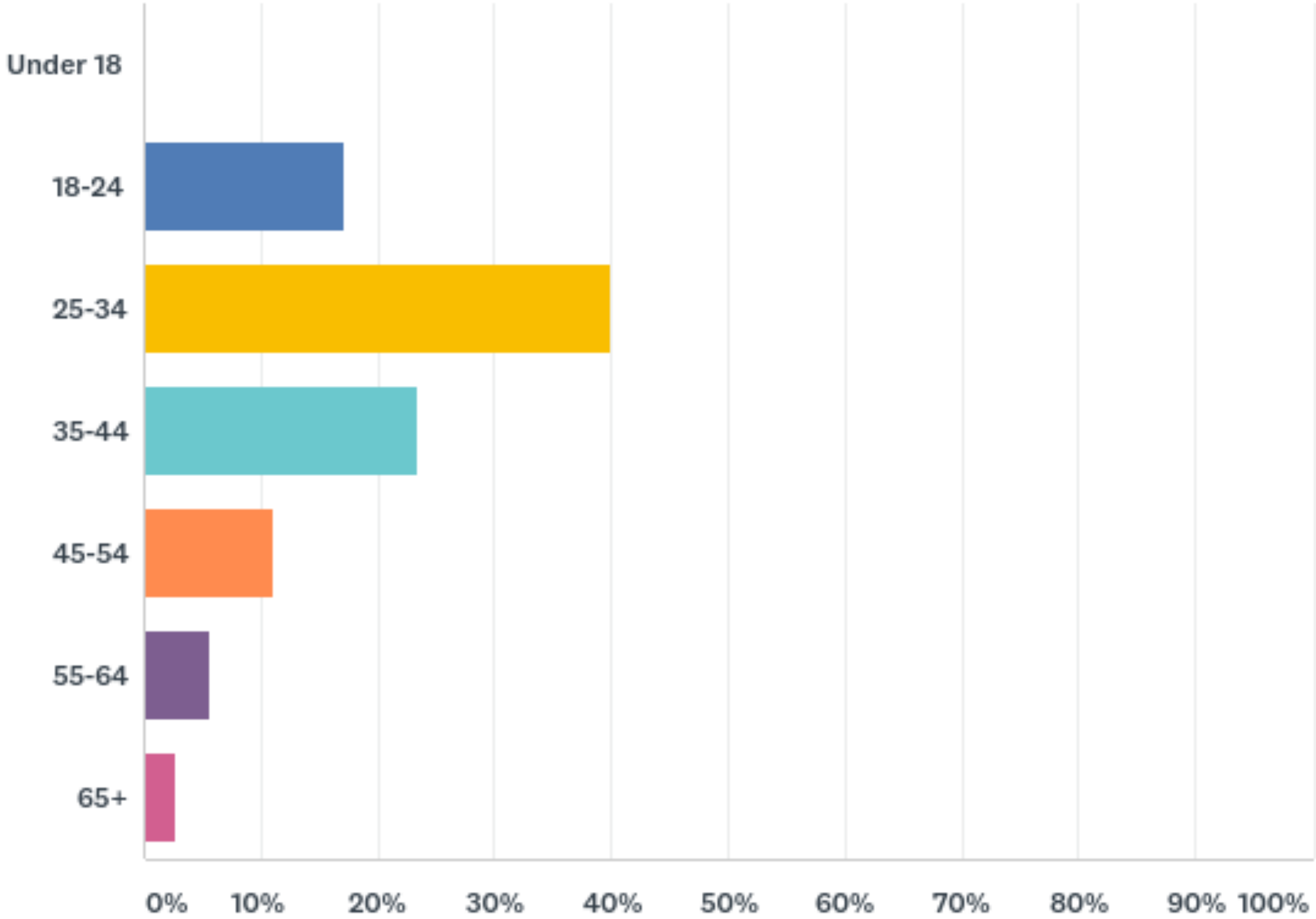
QUESTION 19

How much do you generally spend on any vacations that you take during the summer?

Survey Respondents - 186

Qualitative

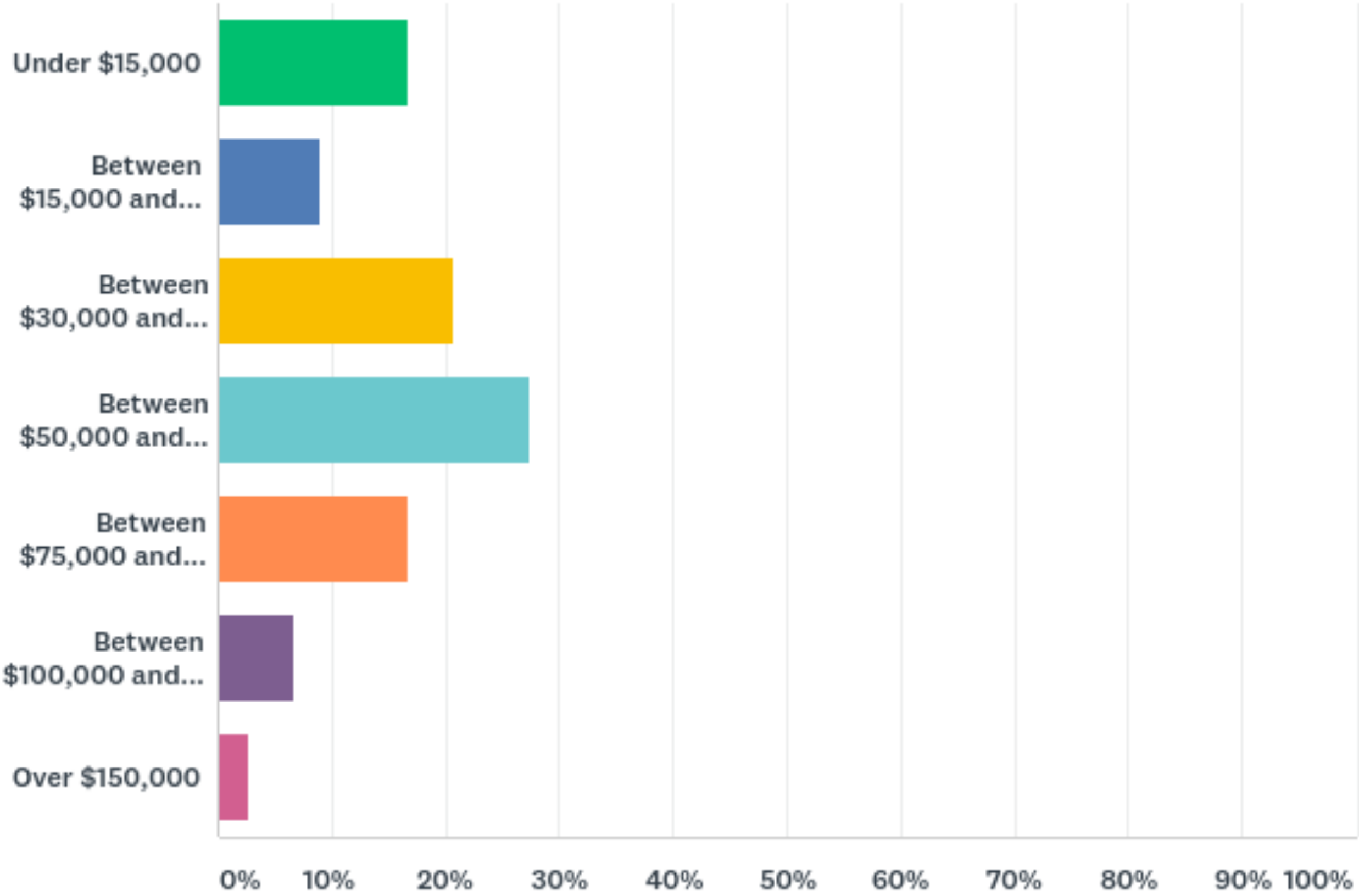
Q15 What is your age?



Survey Respondents - 186

Qualitative

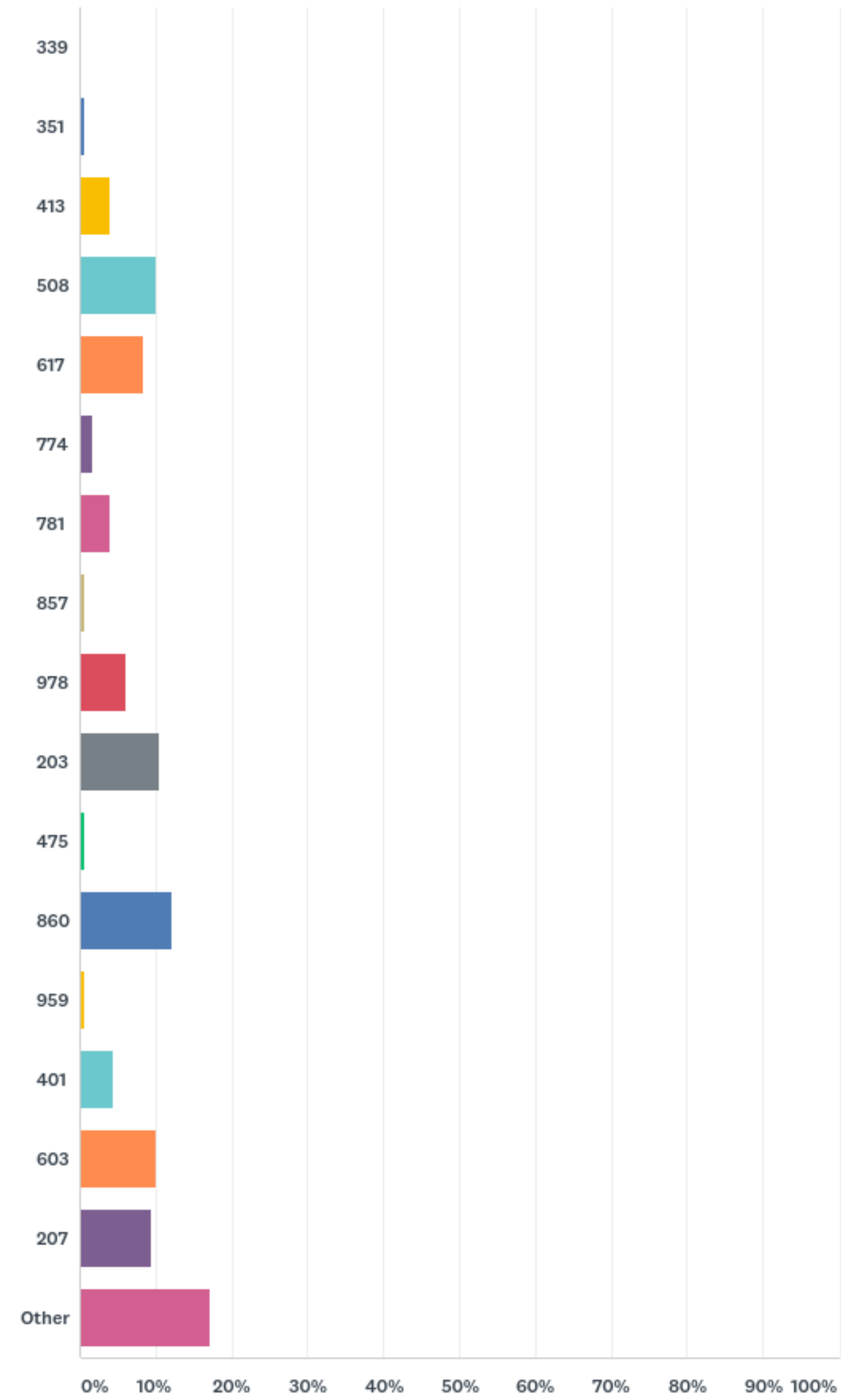
Q14 What is your income?



Survey Respondents - 186

Qualitative

Q16 What is your area code?



Quantitative Survey

Survey Questions

Quantitative

QUESTION 1

When planning a vacation, what are the most important resources that help you decide upon a destination? Please select no more than 2.

QUESTION 2

What state do you live in?

QUESTION 3

Please check if you live in one of the following locations. (screen out Cape residents)

QUESTION 4

What is your age?

QUESTION 5

What is your income?

QUESTION 6

How many children below the age of 16 are in your household?

QUESTION 7

How much do you enjoy re-visiting places that you've been before on vacation?

QUESTION 8

Have you ever gone to the same destination more than once for vacation?

QUESTION 9

If you have gone to a place more than once on vacation, where have you gone?

QUESTION 10

If you enjoy visiting a vacation destination more than once, please tell us why or why not.

QUESTION 11

What type of vacationer are you, or what do you love most about vacations? Please select only 2.

QUESTION 12

How strongly do you agree with this statement: "When I go on vacation, I want to avoid touristy areas."

QUESTION 13

How frequently do you visit Cape Cod?

QUESTION 14

What regions of Cape Cod have you visited? Select all that apply. (See visual aid above.)

QUESTION 15

When you go to Cape Cod, what do you bring back with you?

QUESTION 16

How many days do you stay on your trips to Cape Cod?

QUESTION 17

How do you get to Cape Cod?

QUESTION 18

Why do you enjoy going to Cape Cod? Select no more than three from the options below.

Survey Questions

Quantitative (continued)

QUESTION 19

What type of Cape Cod vacationer are you, or what do you love most about Cape Cod vacations? Please select only 2.

QUESTION 20

When planning a vacation to Cape Cod, what are the most important resources that help with your planning? Please select no more than 2.

QUESTION 21

Why do you not go to Cape Cod? Select no more than two from the options below.

QUESTION 22

What towns in Cape Cod can you name off the top of your head? Please list.

QUESTION 23

When you think of Hyannis, what are three words that come to mind?

QUESTION 24

When you think of Barnstable, what are three words that come to mind?

QUESTION 25

How strongly do you agree with this statement: "Cape Cod has lots of activities to do."

QUESTION 26

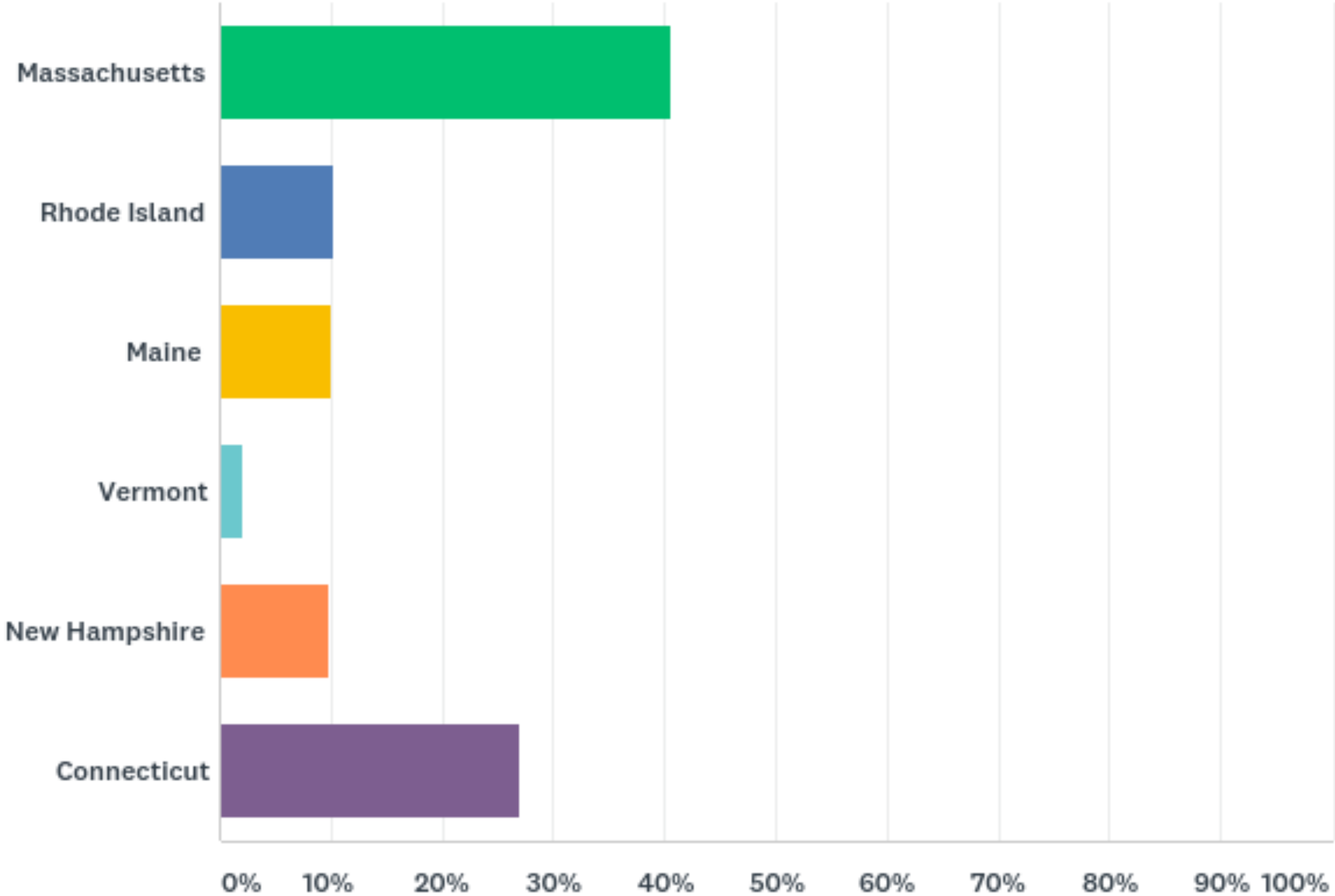
How much do you generally spend on any vacations that you take during the summer?

QUESTION 27

What kind of people visit Cape Cod? Select no more than two from the choices below.

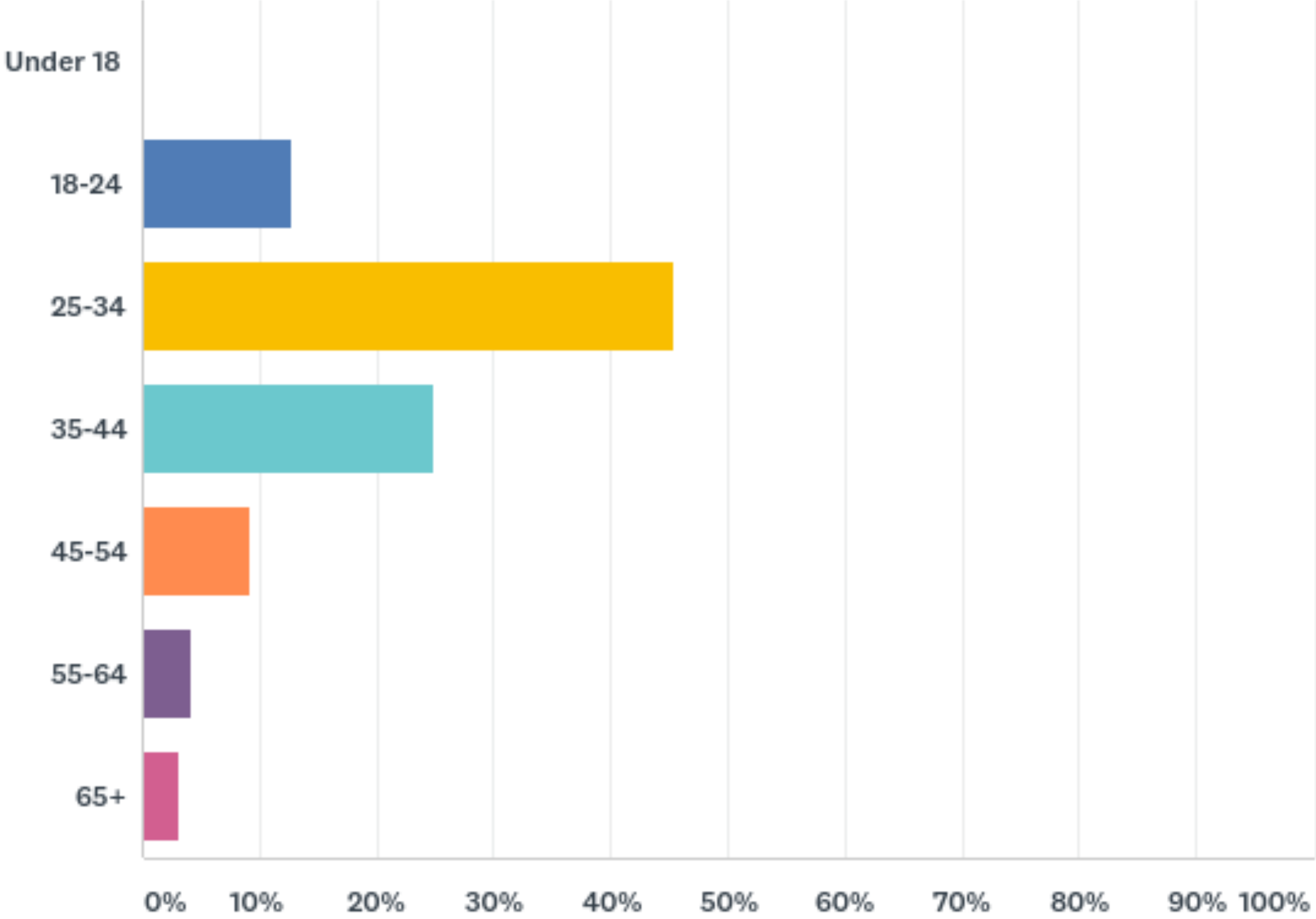
Survey Respondents - 437
Quantitative

Q2 What state do you live in?



Survey Respondents - 437
Quantitative

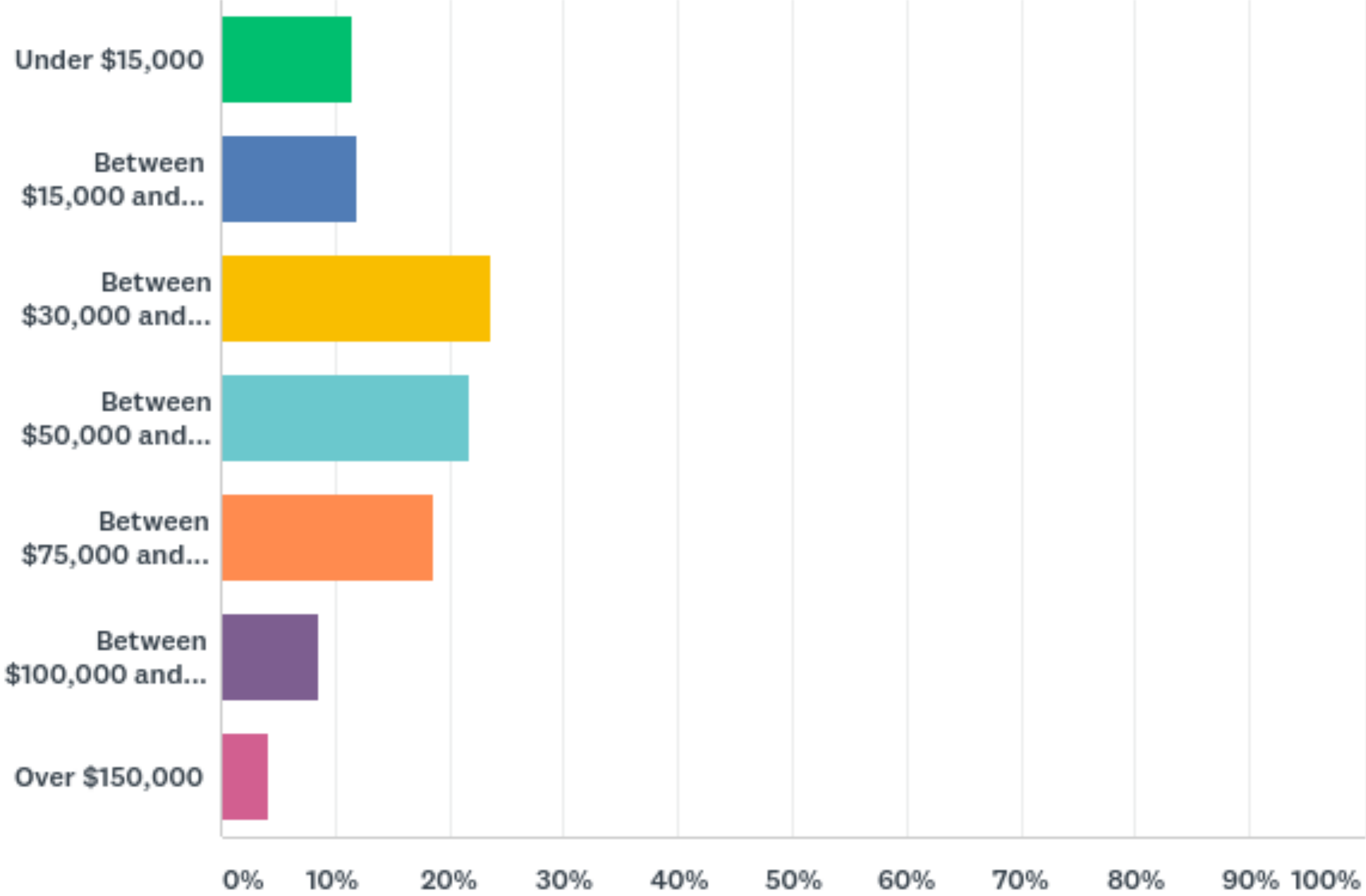
Q4 What is your age?



Survey Respondents - 437

Quantitative

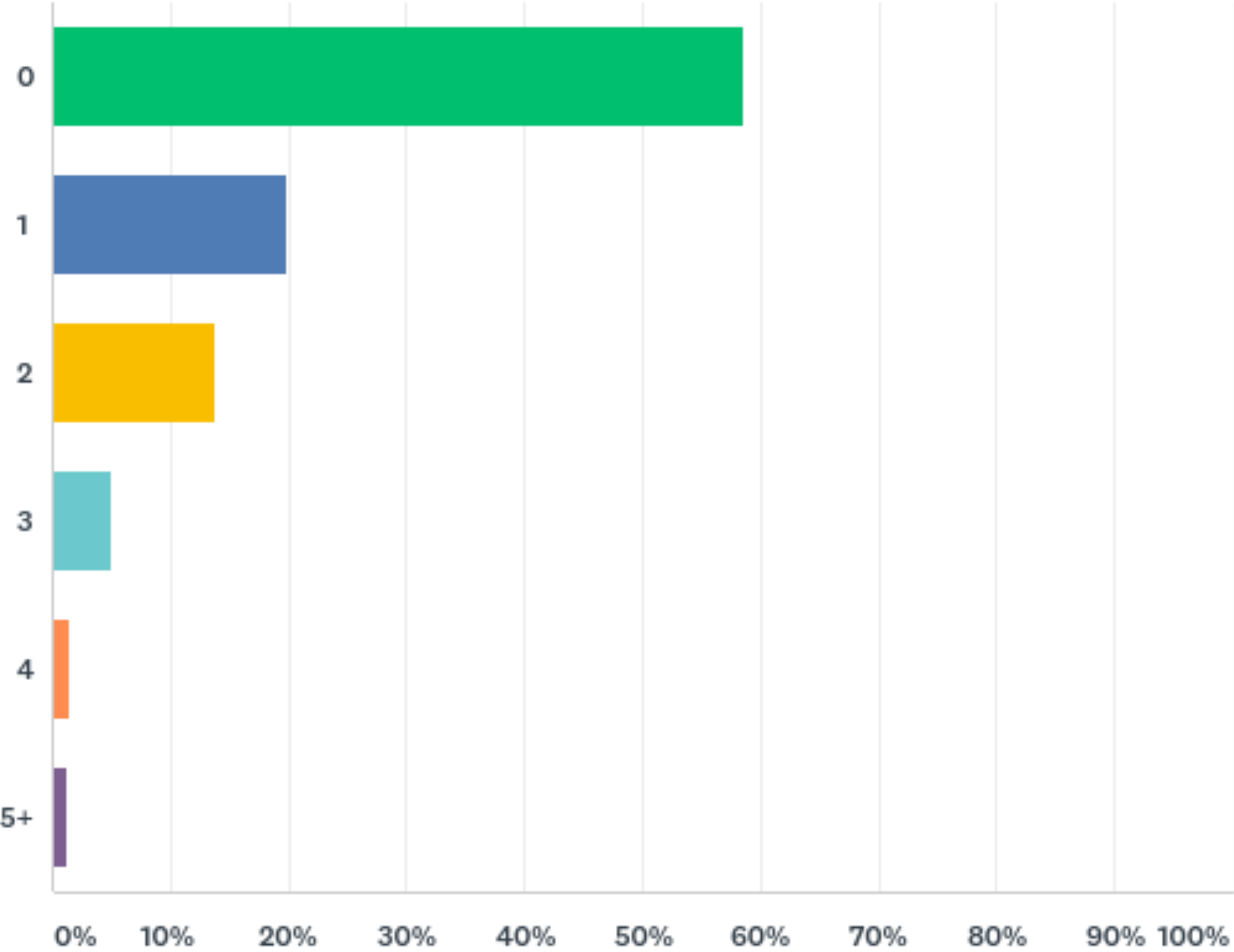
Q5 What is your income?



Survey Respondents - 437

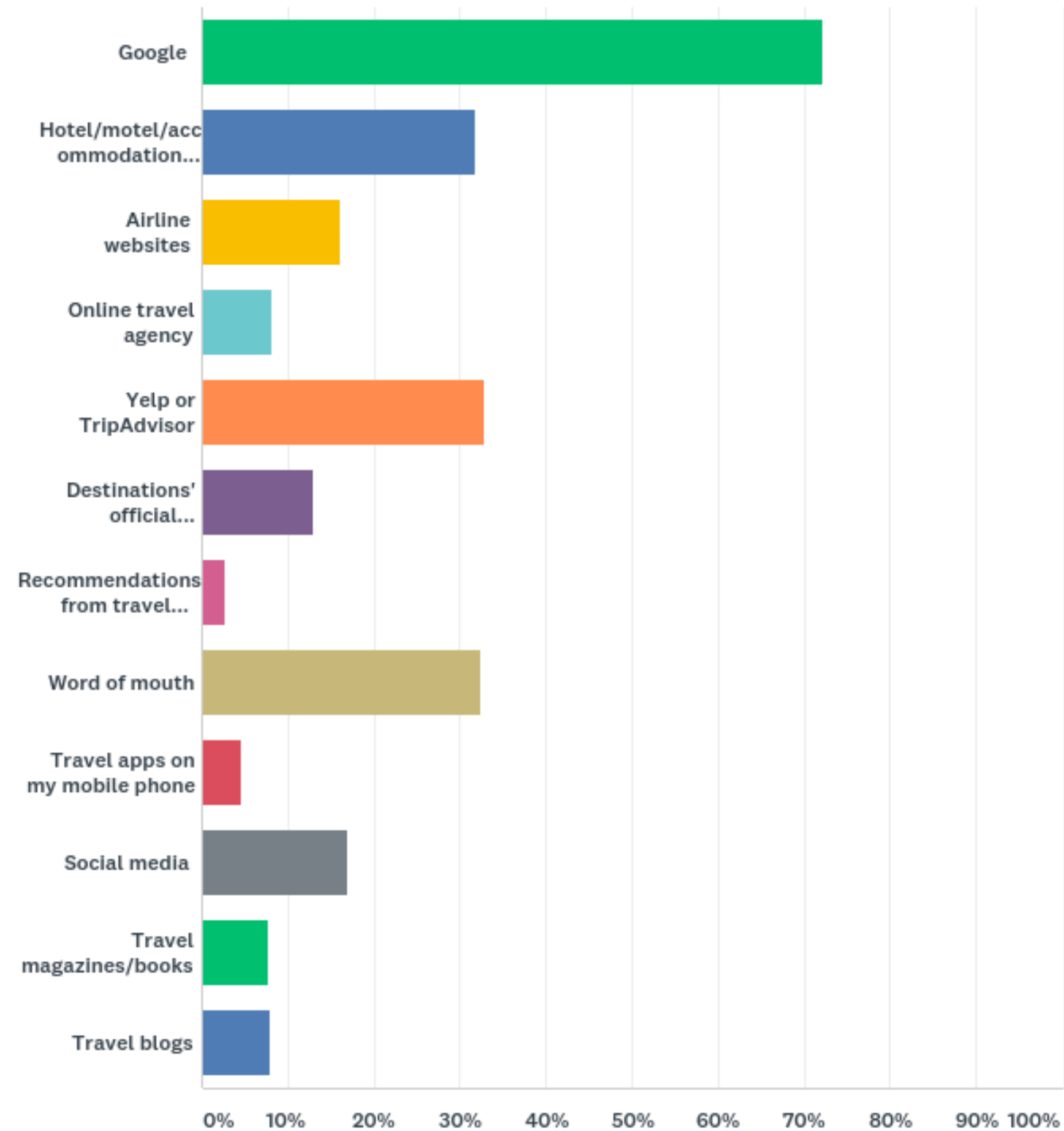
Quantitative

Q6 How many children below the age of 16 are in your household?

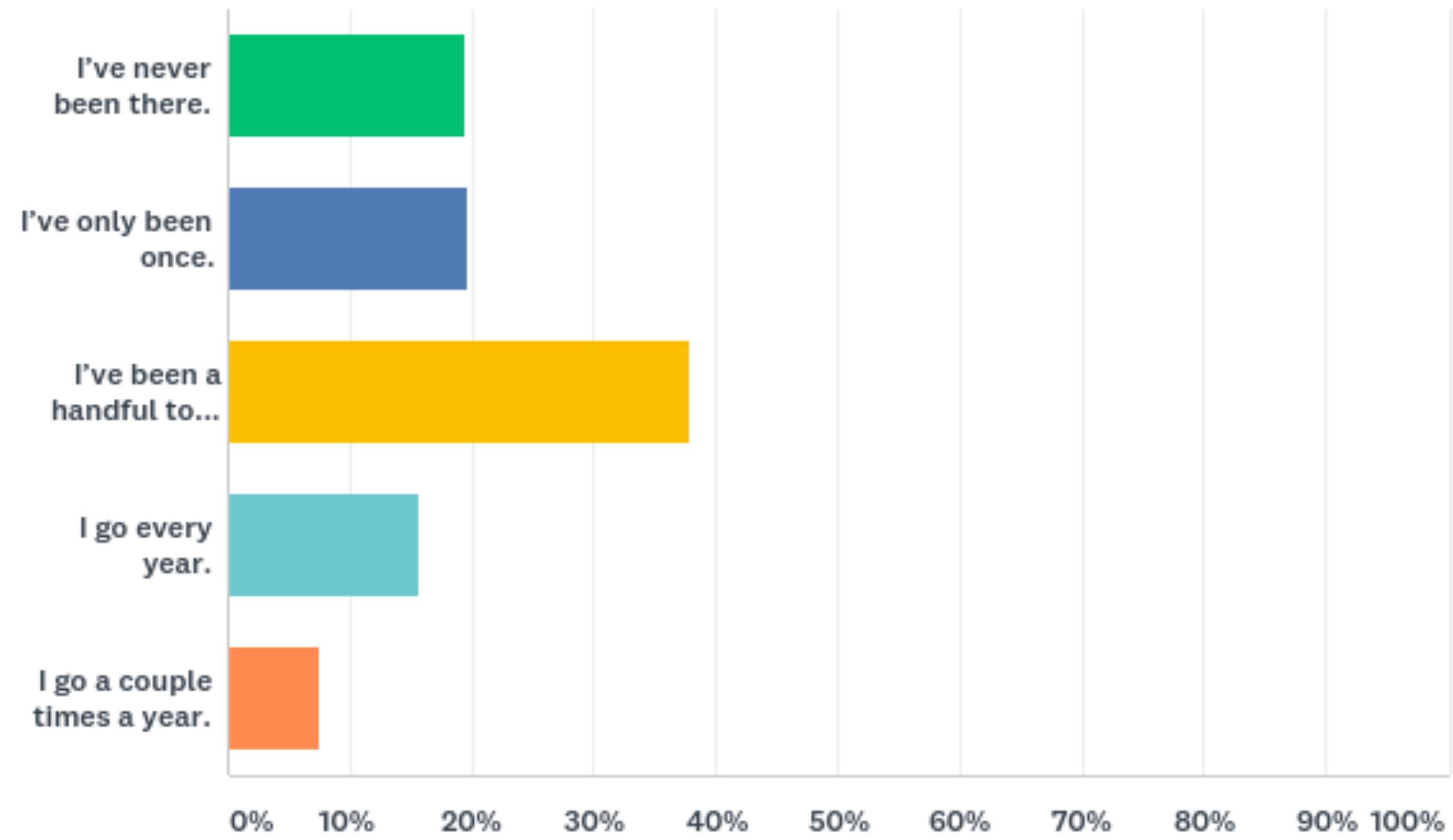


Other Findings

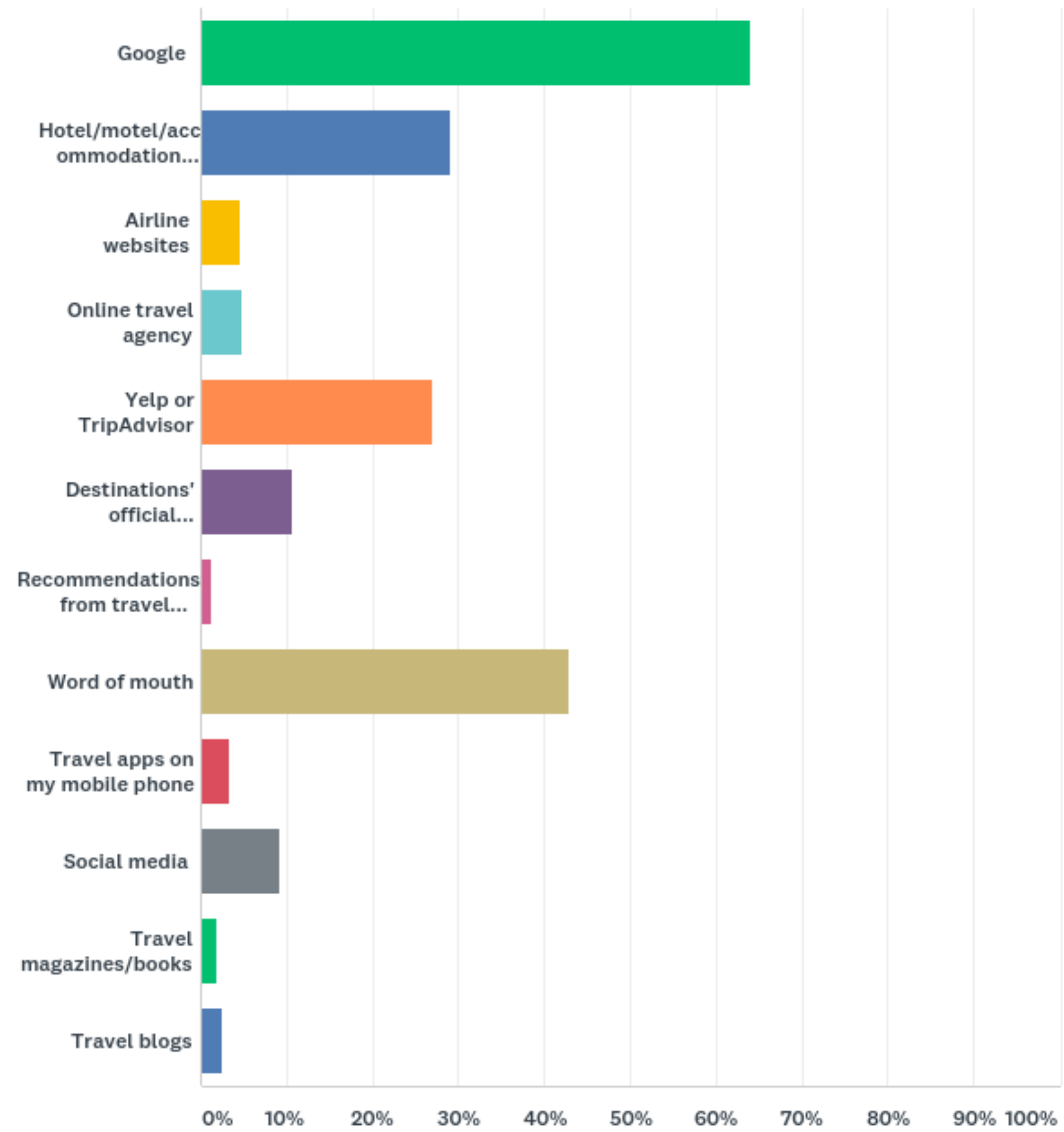
Q1 When planning a vacation, what are the most important resources that help you decide upon a destination? Please select no more than 2.



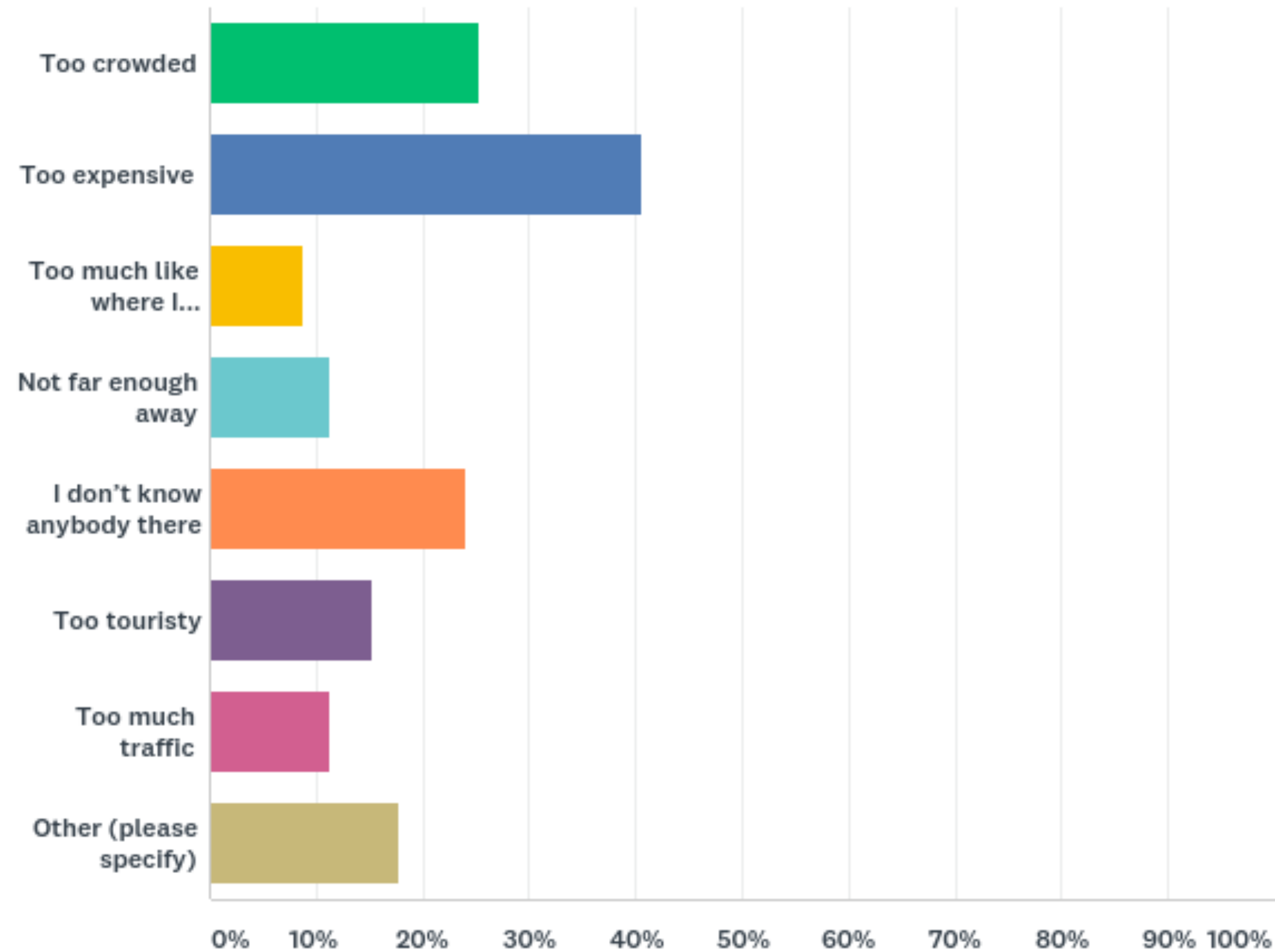
Q13 How frequently do you visit Cape Cod?



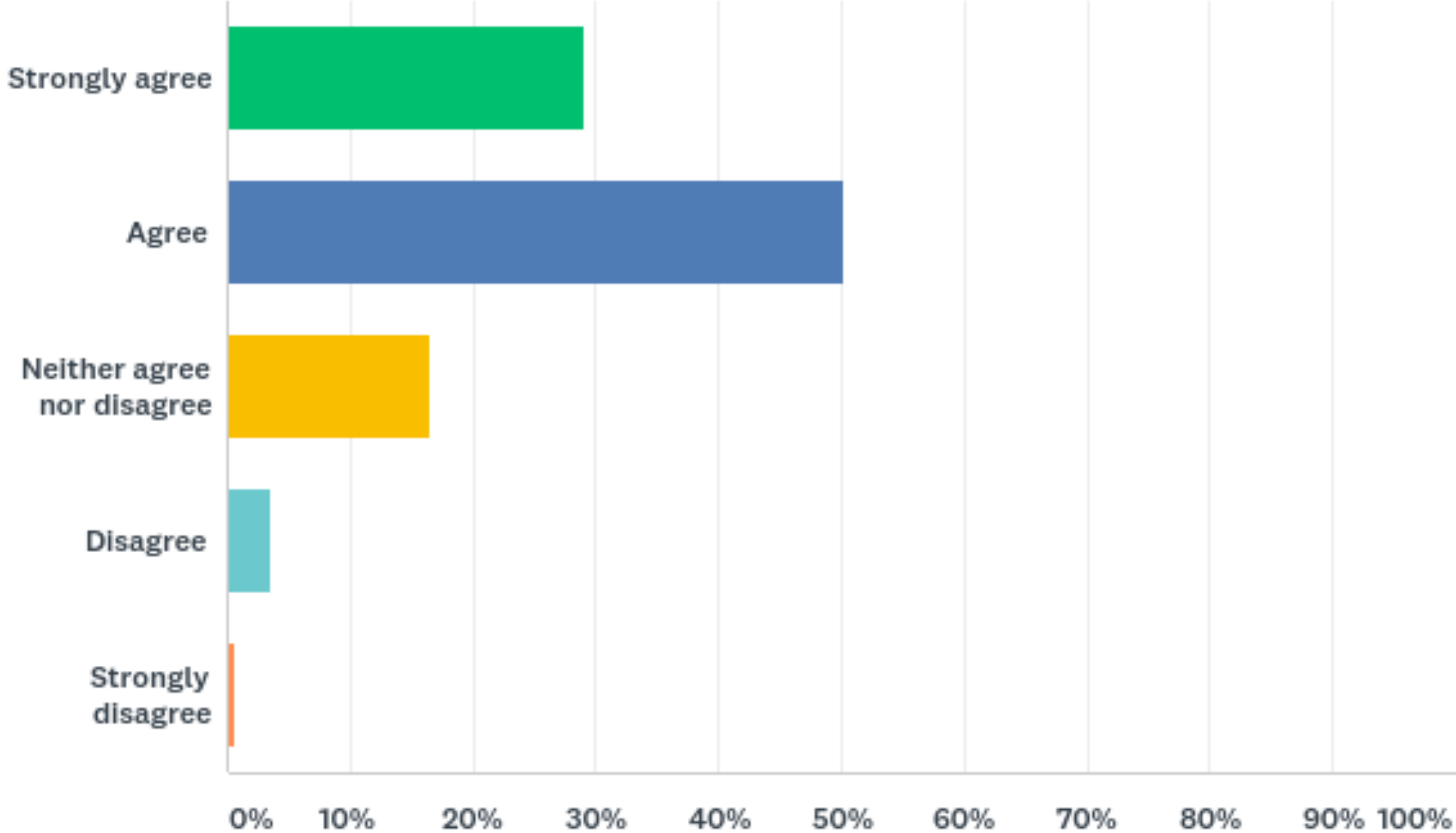
Q20 When planning a vacation to Cape Cod, what are the most important resources that help with your planning? Please select no more than 2.



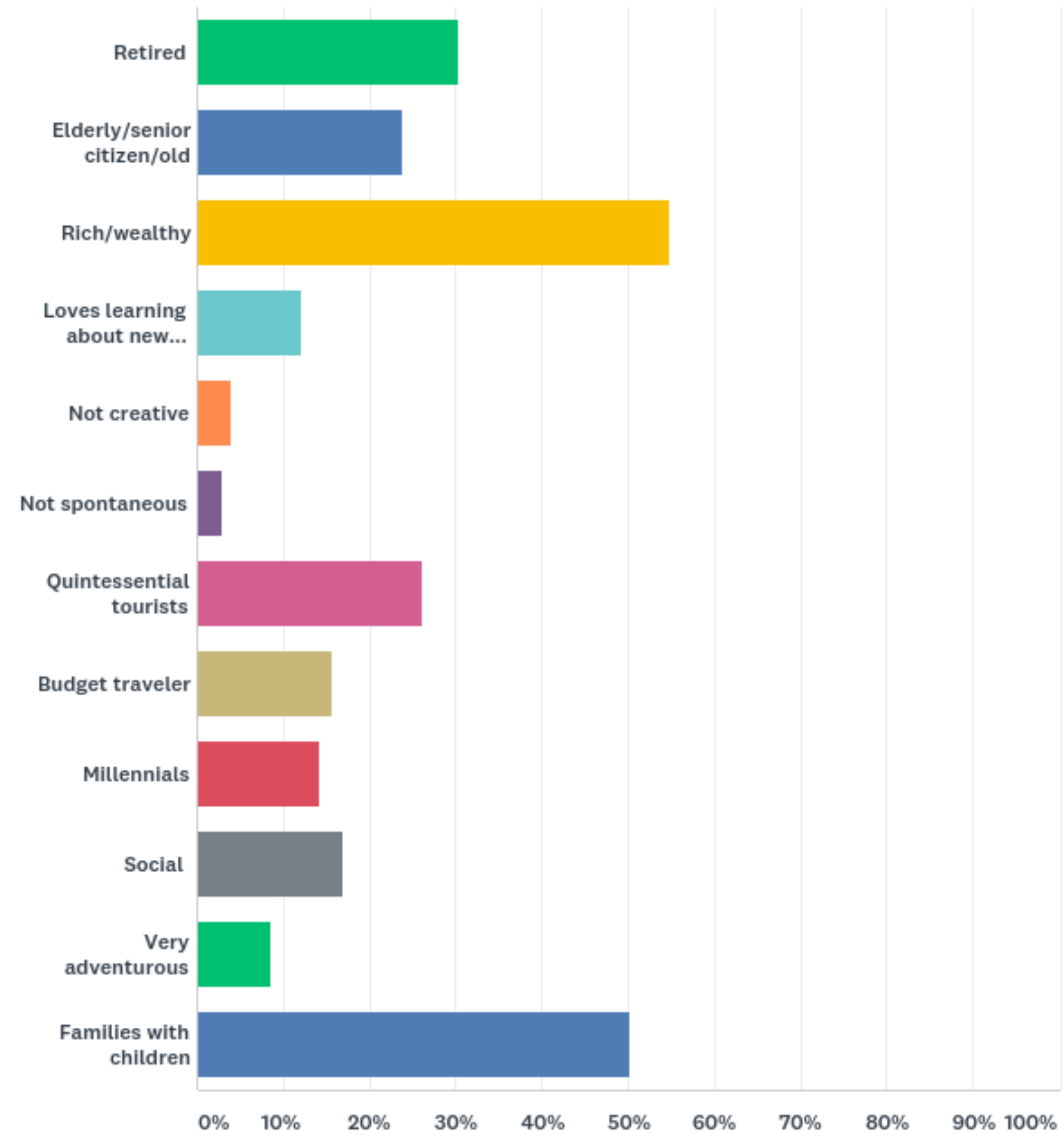
Q21 Why do you not go to Cape Cod? Select no more than two from the options below.



Q25 How strongly do you agree with this statement. Cape Cod has lots of activities to do?

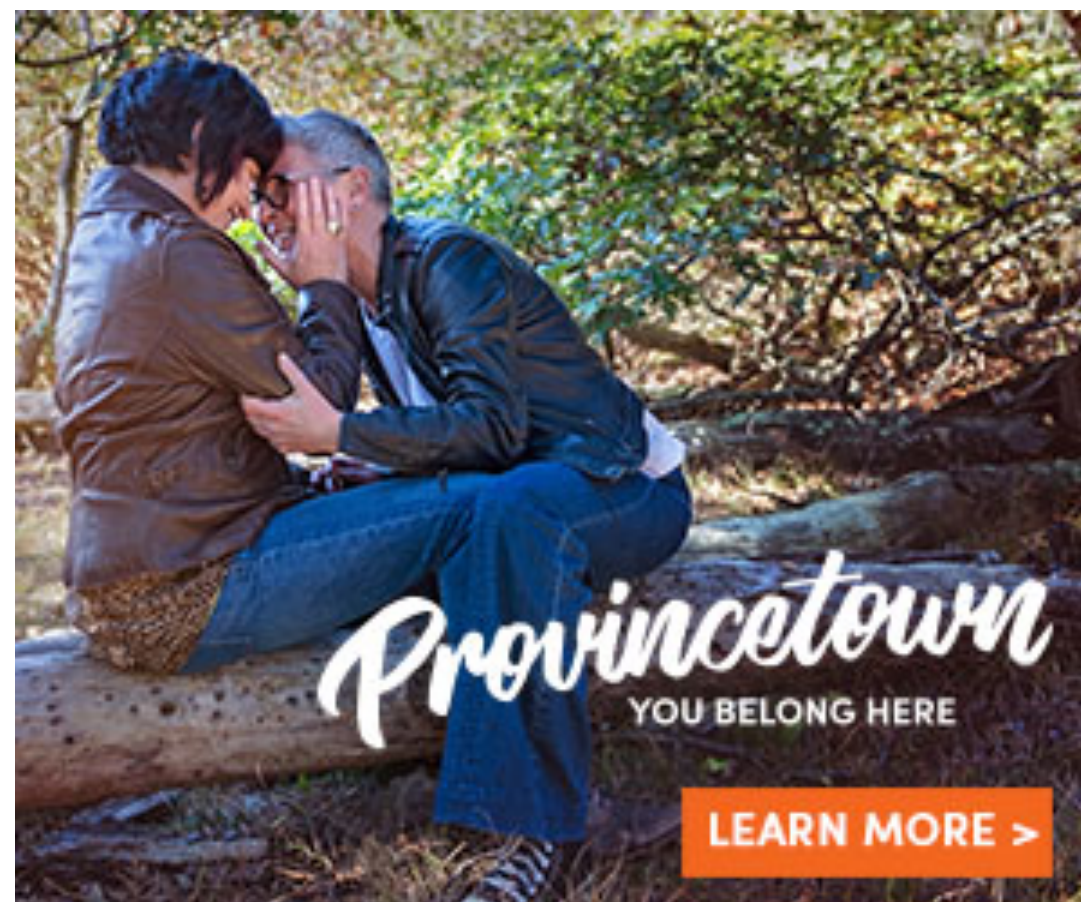


Q27 What kind of people visit Cape Cod? Select no more than two from the choices below.



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