

Visit Isle of Man

Strategic Plan to 2023

Contents

3. Foreword

6. Our Ambition

7. Strategic Actions

14. Priority Areas

16. Our Visitors and Target Markets

18. UNESCO Biosphere Region

20. Towards 2030

All information stated in the document is correct at time of printing

Foreword



Welcome Fait erriu

Hon Laurence Skelly MHK
Minister for Enterprise

The Island is home to an extraordinary offering for visitors, with a distinct cultural identity, unique landscapes and a rich heritage.

Tourism remains a significant element of the Isle of Man's economy and is an integral component of the Programme for Government as we strive to create an Island of Enterprise and Opportunity. The quality of the destination is intrinsically linked to the quality of life of its residents and it is this association that makes the Isle of Man the natural choice to live, work and visit.

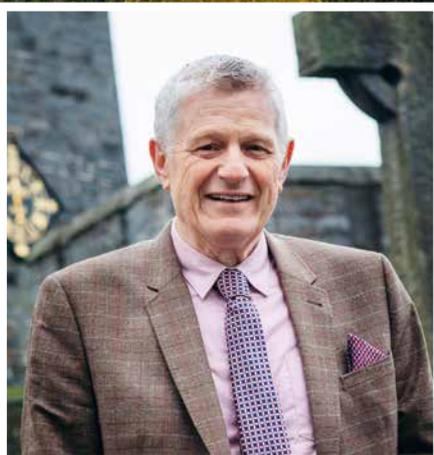
The Visit Isle of Man Agency ('Visit Isle of Man') was established to help realise the fullest economic growth potential of the Island as a visitor destination and the progress made to date in the areas of policy input, product development and promotion have been critical in helping to achieve this. This private and public partnership model has served to facilitate and strengthen collaboration and communication which has led to an increase in confidence within industry. The recent level of private investment, with two new hotels and a number of new businesses within the sector is testament to this growing confidence.

The recent developments in our hotel industry and wider visitor economy signal a period of 'renaissance' for tourism and as a Government we are committed to the greater development and growth of the industry. It is encouraging

to see an increasing number of planning applications within the accommodation sector and a growing level of investment in our infrastructure. This includes a significant undertaking to refresh the Douglas promenade and the development of a new ferry terminal in Liverpool alongside plans for new and refurbished Isle of Man Steam Packet Company passenger vessels by 2021.

We must also acknowledge that we need to evolve the face of tourism on the Island, becoming more accessible and branching out to new markets, geographically and demographically, to raise our profile in a very competitive marketplace. The next few years will be critical for Visit Isle of Man as we look to build on past successes to safeguard our future.

"We are an Island in a sea of opportunity"



Ranald Caldwell
Non-executive Chairman Visit Isle of Man

The progress that Visit Isle of Man has made in building and strengthening the foundations for visitor growth has been significant.

We have adopted core business disciplines, developed our visitor propositions as well as increased the profile and awareness of the Isle of Man, adopting a 'visitor first' approach in everything we do. The most pleasing aspect to me, as Chair, has been the cooperation and support of our colleagues, visit business owners, board members and many of our industry and governmental partners. I would like to say thank you for joining us in the development of our industry. A recent PricewaterhouseCooper's report into the effectiveness of the Agency summarised "Visit Isle of Man has successfully brought together politicians, civil servants and members of the private

sector better than any organisation of its type on the Island for some time." Visit Isle of Man has exciting plans to capitalise on the opportunity that the improved partnership between public and private sectors presents us.

We strive to operate smarter and more efficiently and with this solid base we have created a robust strategy for growth, laid out in the coming pages, which serves to support the businesses already involved in the industry whilst identifying avenues for future diversification and new product opportunities.

We have the confidence

By 2023 we will deliver 340,000 visitors to the Island, visitor spending of £159 million into the Visitor Economy and more than 3,500 jobs underpinned by the visitor economy.

These outcomes cannot be achieved by Visit Isle of Man on their own and it is in a spirit of partnership that we must move forward. The industry is diverse and every area has a part to play, from our accommodation providers, our vibrant food and drink sector, our culture and heritage, to our activity and transport providers that add so much to the visitor experience. We recognise the need to work more closely with the travel trade to deliver the growth our industry aspires to. Experience from other jurisdictions tells us that more effective relationships will be the single biggest improvement for Visit Isle of Man in terms of attracting more visitors whilst improving their experience on the Island.



We have the opportunity

There are considerable opportunities across the UK and Ireland, with a potential visitor population of over 11 million*. The UK staycation market is currently worth £14 billion to the UK economy and shows no sign of slowing as the number of Brits intending to take more domestic holidays has risen amid economic uncertainties and we must look to capture a representative share of this market.

The Island's proposition is growing and we have a captivating story to tell. We are the only entire nation in the world to have been awarded UNESCO Biosphere status which highlights that the Isle of Man truly is a special place to live, work and visit. In the words of Tony Berry, Visitor Experience Director for the National Trust, "The Isle of Man has got what tourists want in spades, why would you not want to visit?".

We have the ambition

Whilst this document outlines our strategy to 2023, Visit Isle of Man has recently started work on an enhanced 10 year strategy, with a view to growing the number of visitors to 500,000 per annum by 2030. Our industry partners will all have the opportunity to take part in this exciting journey that has the potential to transform the industry and the quality of Island life.

**Research undertaken utilising Target Group Index (TGI) to profile likely visitors to the Isle of Man from across the UK. TGI data is a form of consumer insights that creates audience profiling for media planning and buying.*



Our Ambition

Vision

To establish and promote the Isle of Man as a quality, year round, visitor destination for our target audiences.

Mission

To ensure the provision of a first class visitor offering through enhanced partnerships, innovative products and dynamic marketing strategies which boost the Island's proposition and image, while building on our UNESCO Biosphere status and drive for sustainable tourism.

Aims



340,000

visitors to the
Isle of Man



3,500

jobs in the
visitor economy



£159m

visitor
spend

Strategic Actions

Visit Isle of Man has outlined an ambitious vision for tourism. The strategy sets out six core aims to ensure the targeted promotion and consistent development of the sector.

1 Exceptional Visitor Experience

Fostering a culture that focuses on providing a service which exceeds visitor expectations to create lasting memorable experiences

2 Partnerships

Strengthening relationships with local industry, other government departments and expanding our network of travel trade partners to accelerate the growth of the visitor economy

3 Product and Event Innovation

Championing new investment and product development to meet the needs of our current and developing markets

4 Promotion and Marketing

Promoting all year round tourism to the Isle of Man through innovative and omni-channel marketing campaigns, highlighting our distinctive visitor proposition

5 Policy Development

Removing barriers to growth to encourage and actively seek inward investment

6 Enhanced Research and Measurement

Creating and maintaining a programme of research and market intelligence to direct strategy





1

Exceptional Visitor Experience

Visitors are demanding more in terms of quality and value for money as they look to maximise the overall experience.

Providing an exceptional visitor experience and promoting a service culture which puts the visitor first is fundamental to Visit Isle of Man's strategy. We will continue to work with businesses to improve visitor service levels, accommodation quality, and food and drink experiences which meet the changing visitor expectations. We will deliver a programme of learning and development to encourage the best use of online booking platforms, digital marketing and social media channels to improve the efficiency of the sector for the benefit of our visitors.

Following a six month 'visitor first' cross-industry project to review the Island's approach to customer experience management, we are now entering an exciting period of implementation as we look to roll out key recommendations. This will include the creation of a new focus to coordinate and manage the 'visitor first' agenda.

2

Partnerships

Travel Trade

Our travel trade partners play a significant role in attracting visitors to the Isle of Man. They help open up new markets, reach larger numbers of potential visitors and can gain maximum value from them through cross-selling potential. Our primary focus for the duration of the strategy will be to take the lead on the formation of an enhanced network of key operators and agencies and engaging a mix of distribution partners who will champion the Isle of Man as a quality visitor destination and position us within the market.

Local Collaboration

Effective destination management relies on a number of stakeholders working collaboratively to achieve the same goal. In this instance it requires proactive engagement between the four key partners: Visit Isle of Man, Isle of Man Government, Chamber of Commerce and local tourism businesses.

It is our role to provide clear and focused guidance on our strategic actions in order to mobilise our partners to work alongside us. We also recognise that it is our role to listen to the experts in the field, taking advice and seeking opportunities for development. The formation of cross-industry working groups will help us identify the most attractive and valuable propositions. Regular marketing forums to share and develop strategic marketing plans across the sectors will enable a unified approach to boost the Island's identity and increase efficiency. We will also work with industry to create packaged products to take advantage of the trend in 'experience-led' holidays and reduce seasonality issues.





3

Product and Event Innovation

Our focus will be on developing products and events in line with the interests of our current and developing markets. Central to this will be identifying ways in which we can reduce our seasonality issues as well as looking at ways to improve the visitor experience and increase spend.

The way in which we package, promote, develop and diversify our offering holds the key to our success and to meet the changing needs of visitors. In addition to our core themes of heritage and culture, nature and wildlife, we will develop packaged products that meet the trend towards high-intensity breaks, centred on breathtaking experiences and look to capture the 'wellness' and 'me-time' market through a focus on out-of-season 'multi-activity' weekends.

Event development provides an immediate solution to seasonality issues and we will look to support development of non-weather dependent events for the shoulder months. We will also identify those established events with the capacity for growth and increase awareness amongst our target markets, as well as working with travel trade for the promotion of event packages.

4

Promotion and Marketing

Improving perceptions of the Isle of Man and placing our brand front and centre of potential visitors' minds is critical if we are to capture our representative share of the growing visitor market within the UK and Ireland.

We will look to raise awareness amongst our target markets across the UK and Ireland, with a focus on all major transport hubs, throughout the year. Continued audience profiling will ensure our messaging remains effective and enable us to build targeted marketing partnerships with online travel agents. Digital marketing remains central to our plans as consumers are relying more and more on digital channels and platforms for all their travel needs. We also recognise the spread of visitors across our current and developing markets and the consumption of more traditional methods of advertising and will look to develop an integrated campaign across all channels.





5

Policy Development

Visit Isle of Man recognise their role in ensuring that barriers to visitor growth are identified and removed where possible. As an Agency, our intervention to impact tourism growth will be driven by where we can achieve the greatest value over the period of the strategy.

Our aim is to aid and encourage inward investment into the sector through the creation of progressive new policies which provide clear guidance and support progress. We must convey the message that 'we are open for business' which means for example making it easier for investors within the accommodation sector to identify sites for development and making our roads available for visiting car and motorcycle groups, who are high value visitors.

6

Enhanced Research and Measurement

Reinforcing and guiding our activity is reliable data, evidence and insights. The research we undertake as a destination into trends, themes, competitor markets, visitor profiles and marketing initiatives provides the foundations to develop strategic and operational plans.

We need to focus on creating and maintaining an enhanced research and measurement programme to ensure we remain an attractive destination for our target markets. This will include the use of focus groups and visitor insights, continued industry research and working with local businesses to gather significant and meaningful data. Constant campaign monitoring also ensures consistent and effective promotion of the Isle of Man and informs future activity.

Priority Areas

Visit Isle of Man has identified three priority areas which will set the overall strategic direction.

Our visitors, both current and prospective, remain at the core of all that we do. With ambitious targets for growth within the visitor economy, we naturally look to new and developing markets but recognise that we have a base of over 300,000 current visitors who have the potential to become loyal advocates of the Isle of Man.

With the current levels of accommodation, growth during the main visitor season is somewhat constrained. It is for this reason that work to extend the visitor season is vital to achieve our growth targets for the economy but we must also find new and innovative ways to attract visitors as we compete against the popular city break market during these months.

The three priority areas are as follows:

1. Nurture our current visitors

It is imperative we don't lose sight of the importance our current visitors play, particularly motorsport fans and those Visiting Friends and Relatives (VFR), in maintaining a successful visitor economy. Traditional leisure and short break visitors from the UK and Ireland, along with groups and cruise visitors, make up the majority of our current market.

Research shows that those overnight visitors who currently visit the Isle of Man are mostly extremely satisfied with their experience, with over 50% repeating their visit. We have an immediate opportunity to make loyal advocates out of these visitors to encourage repeat visits and must look to identify ways in which we can develop our product offering to increase visitor spend and visitor experience.

2. Grow the current and developing markets

We have only scratched the surface of the markets already visiting the Isle of Man. We will continue to raise awareness of the Isle of Man within these with targeted marketing and through our growing travel trade, to capture our



representative share. For these markets our current offering matches expectations and holiday priorities, including beautiful scenery, tranquillity and a safe environment, however, our barrier to further growth comes from the lack of awareness and in some cases incorrect perceptions of the Isle of Man and its offering. There is also an opportunity to tap into the ever growing 'overseas' visitor market to the UK and Ireland as many visitors combine a number of destinations within their trip. Fundamental to the proposition for our current markets is the Island's heritage and culture and we remain focused on developing this offering to maximise its effectiveness and create new and compelling reasons to visit.

Central to Visit Isle of Man's new strategy is the focus on developing leisure markets across the UK, Ireland, Europe and America with a particular emphasis on niche interest groups which play to the Island's strengths of marine and nature, active and adventure, cycling, walking and golf. By clearly identifying these markets we have provided the foundations for a clear path for product and policy development over the period of the strategy, enabling industry to align, where possible, with this approach. It is our aim to focus on the most valuable visitors within the sector, reaching these visitors with the help of travel trade and strategic partnerships within the niche sectors.

Underpinning our offering for all markets is a vibrant food and drink sector, championing local produce and unique experiences. To remain competitive and a leading destination we must support the development of this sector to encourage investment and diversity.

3. Extend the visitor season

With visitor occupancy running close to capacity during the main season, we must look at innovative ways to develop a year-round visitor economy. Reducing seasonality will help to boost productivity of the sector and support businesses through the difficult shoulder season months. This will require investment in new products and events, to be supported by reliable infrastructure and highly targeted marketing campaigns.

Short breaks are relatively all year-round products, offering a great opportunity for the Isle of Man. Themed holidays around culture, food and wellness in particular are likely to help reduce seasonality and boost the sector's efficiency. This is an area we must build upon and exploit as we look to encourage city break alternatives and meet our growth targets. We have an opportunity to incentivise large specialist groups, such as car and motorsport clubs, to visit during the shoulder months.



Our Visitors

It is important to understand our visitors' motivations and interests to create compelling marketing campaigns, suited for the audience. Consumer behaviour is constantly changing with new trends influencing the decision making process. Alongside this is an ever evolving proposition as we aim to meet the requirement of our visitors.

Our visitor segments and subsequent audience profiles, graded by interests, are:



Traditional Travellers:

Empty nesters and older couples, they are conservative and traditional, sticking to what they know. They like local, British quality and enjoy holidays which allow them to take things at a leisurely pace.



Curious Explorers:

They are open-minded and they like to use their free time to explore the world and new things, often off the beaten track. They have a broad array of interests and enjoy being challenged intellectually as well as being outdoors.



Experience Seekers:

This group live life at full speed and are always on the go. They want to do well in their careers and work hard, so relaxation time is limited and is spent reconnecting with what matters. They love outdoor activities which give them a new perspective and seek out new exciting experiences.

Target Markets

To deliver immediate success and create long term opportunities for growth, we have highlighted behavioural nuances within our visitor segments and identified our current visitor market that we will look to nurture and grow, as well as outlining key visitor markets for development.

Current Markets (UK / Ireland)	Developing Markets (UK / Ireland / Europe / America)	Events
Leisure and Short Break	Biosphere	Motorsport
Visiting Friends and Relatives	Marine and Nature	Heritage and Culture
Groups	Active and Adventure	Adventure and Endurance
Cruise	Walking	Sports
	Cycling	
	Golf	
	Specialist Groups	
	Sports	

UNESCO Biosphere Region



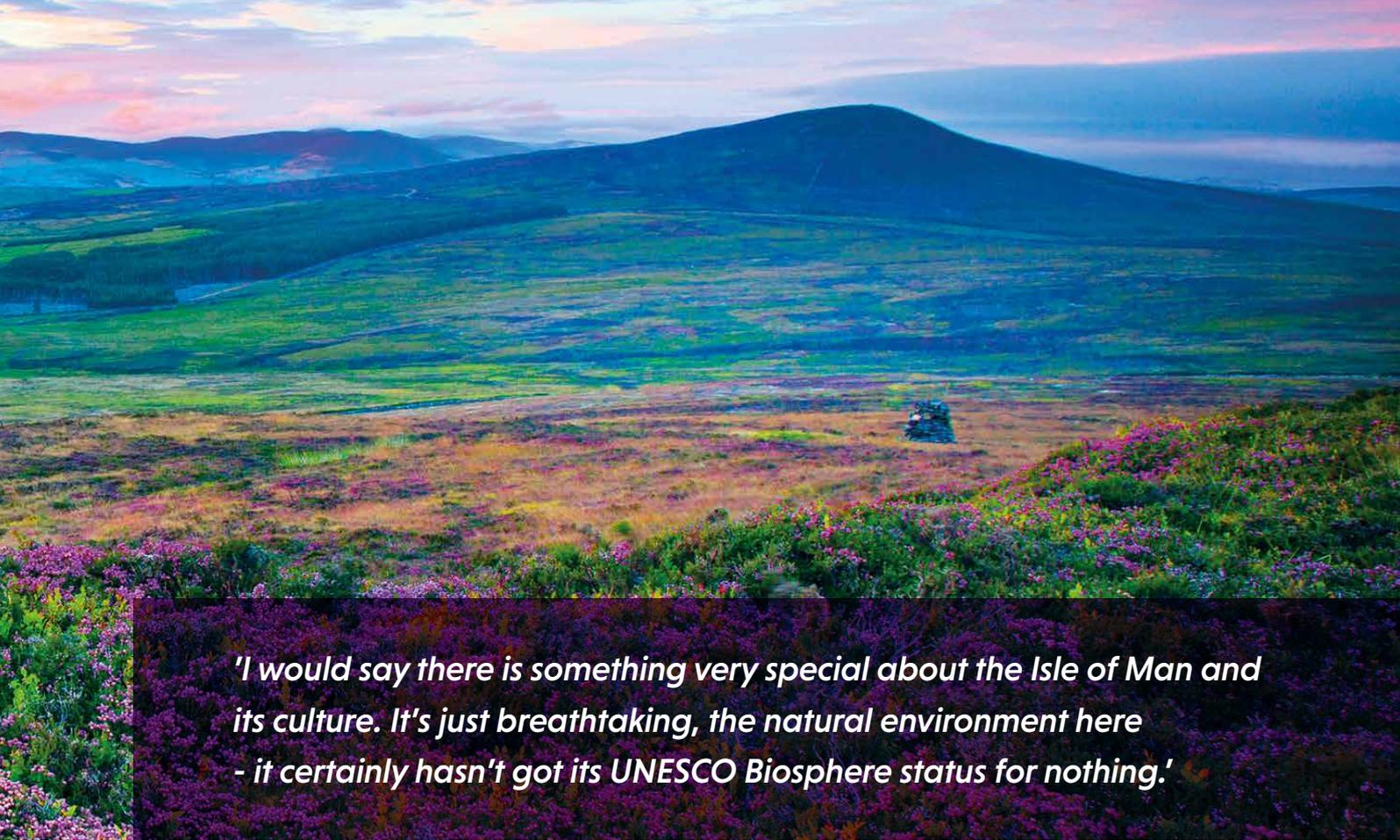
In March 2016 the Isle of Man was awarded status as a UNESCO World Biosphere Region.

The Island is the only entire jurisdiction in the world to be awarded this prestigious title and this status recognises the way in which the Island's population exists alongside a plethora of diverse natural habitats.

The Isle of Man prides itself on this award and is committed to the conservation of not only nature and wildlife, but also our culture, heritage and communities. Specific initiatives range from marine conservation to safeguarding our flora and fauna to enhancing urban spaces. In addition to this, the recently developed 'Active Travel Strategy' aims to create

an environment where cycling and walking are normal and realistic transport choices for people of all ages. Active travel brings about a multitude of benefits not only to individuals but to the wider environment too, and is a key component of our Locate programme.

Visit Isle of Man will work to ensure that visitor growth is achieved in line with the 'UNESCO Biosphere Isle of Man' goals of preservation and conservation, whilst working with Biosphere stakeholders to leverage the status for growth within the sustainable and ecotourism markets. The UNESCO Man and Biosphere (MAB) Programme works on the understanding that Biosphere Reserves promote a healthy interaction between ecosystems and human activities. The concept of ecotourism as a driver for visitor growth is well documented and the positive impact on future behaviour towards the environment, as a result of visiting Biosphere region's is fundamental to the MAB programme success. A key goal of UNESCO is to support sustainable tourism as it recognises the potential that heritage and cultural sites have for local economic development and the pay off this brings in return on the conservation of such sites. Together these factors, along with the growing focus on sustainability issues, positive impact experiences and reducing over-tourism amongst short break takers, provide an ideal platform for the Island to capitalise on.



'I would say there is something very special about the Isle of Man and its culture. It's just breathtaking, the natural environment here - it certainly hasn't got its UNESCO Biosphere status for nothing.'

Julia Bradbury

Television presenter (BBC Countryfile 2004 – 2014 and Britain's Best Walks 2017)

A UNESCO world biosphere region, or reserve, has three main functions:

1 **Conservation** of our natural and built environment, our culture and heritage, our communities and our special sense of place.

2 **Sustainable development** and how we live our lives in a way that ensures a healthy future for our economy, environment and society. This is delivered via the UN's Sustainable Development Goals, also known as the Global Goals.

3 **Education** about the impact our actions have and how we can make decisions and take actions that have a positive effect on our planet.

Towards 2030

This is an exciting time for Visit Isle of Man and we are looking forward to working with each and every one of our stakeholders to develop and deliver a strategy which not only realises growth for the economy but supports and complements all our sectors and businesses.



During the creation of our 2023 strategy and production of the accompanying operational plans, the scale of the opportunity facing our Island and the need for a long term strategy for tourism growth to guide policy and product development has become apparent. We appreciate that effecting change takes time and acknowledge the work that needs to be undertaken to create a strategy for dramatic and lasting change.

The UK domestic tourism sector accounts for approximately 60 million visitors and the demand for staycations is expected to grow as people opt for local and short haul breaks for a wide variety of reasons including economic, security, ecological, comfort and convenience.

Building a solid partnership with the travel trade, both on and off-Island, will provide further opportunities to reach global markets and leverage the inbound tourism drive from Visit Britain.

As we look to our peers around the UK, Ireland and the Channel Islands, we can see the opportunity available to us and must ensure we capture our representative share of the growing market. To do so we must identify market segments and corresponding product development opportunities and ensure our infrastructure is fit for purpose so that the Isle of Man is regarded as a leading destination.

The quality of the destination is intrinsically linked to the quality of life of the residents; which confirms that the value of the visitor economy sector is worth more than just its contribution to GDP. This value needs to be recognised and Visit Isle of Man's ambition reflects this.

Visit Isle of Man believes that the above factors warrant an ambitious vision of **500,000 visitors per annum by 2030**.

To deliver our ambition we will need to invest in strategic building blocks to effectively and expertly service this level of growth, whilst balancing the impact on our environment.

These will be focused on:

Infrastructure



Accommodation



Attraction and Activities



Product and Events Development



Marketing









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