



INDUSTRY SENTIMENT SURVEY 2024 - RESULTS



127 RESPONSES

- 70 ACCOMMODATION PROVIDERS
- 27 ACTIVITY & ATTRACTION BUSINESSES
- 16 HOSPITALITY BUSINESSES
- 2 EVENTS ORGANISERS
- 6 TOUR GUIDES
- 2 TOUR OPERATORS
- 2 DESTINATION MANAGEMENT COMPANIES
- 2 'OTHER'



Breakdown of Accommodation Providers

- SELF-CATERING: 37
- B&B: 16
- HOTEL: 9
- GUESTHOUSE: 3
- SERVICED APARTMENT: 2
- GUEST ACCOMMODATION: 1
- CAMPSITE: 1
- HOSTEL: 1



Breakdown of Activity & Attraction Businesses

- OUTDOOR ADVENTURE: 10
- MUSEUM: 4
- HISTORICAL SITE: 3
- WORKSHOP: 3
- INDOOR ATTRACTION: 2
- ACTIVITY CENTRE: 1
- ANIMAL ATTRACTION: 1
- INDOOR ACTIVITY: 1
- VISITOR CENTRE: 1
- NATURE: 1



ORIGIN OF RESPONSES

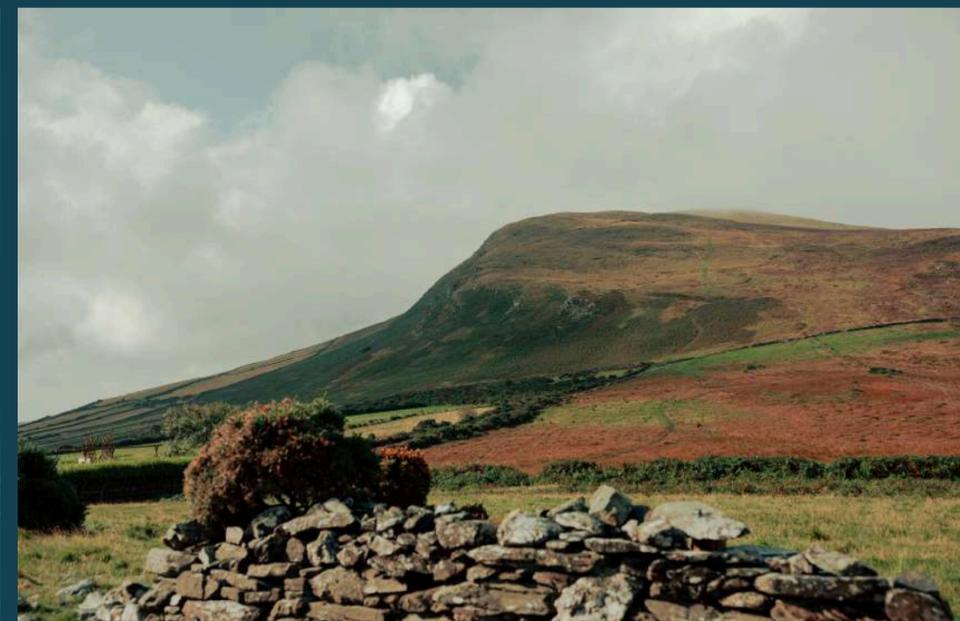
LinkedIn: 25

Newsletter: 10

Email: 92



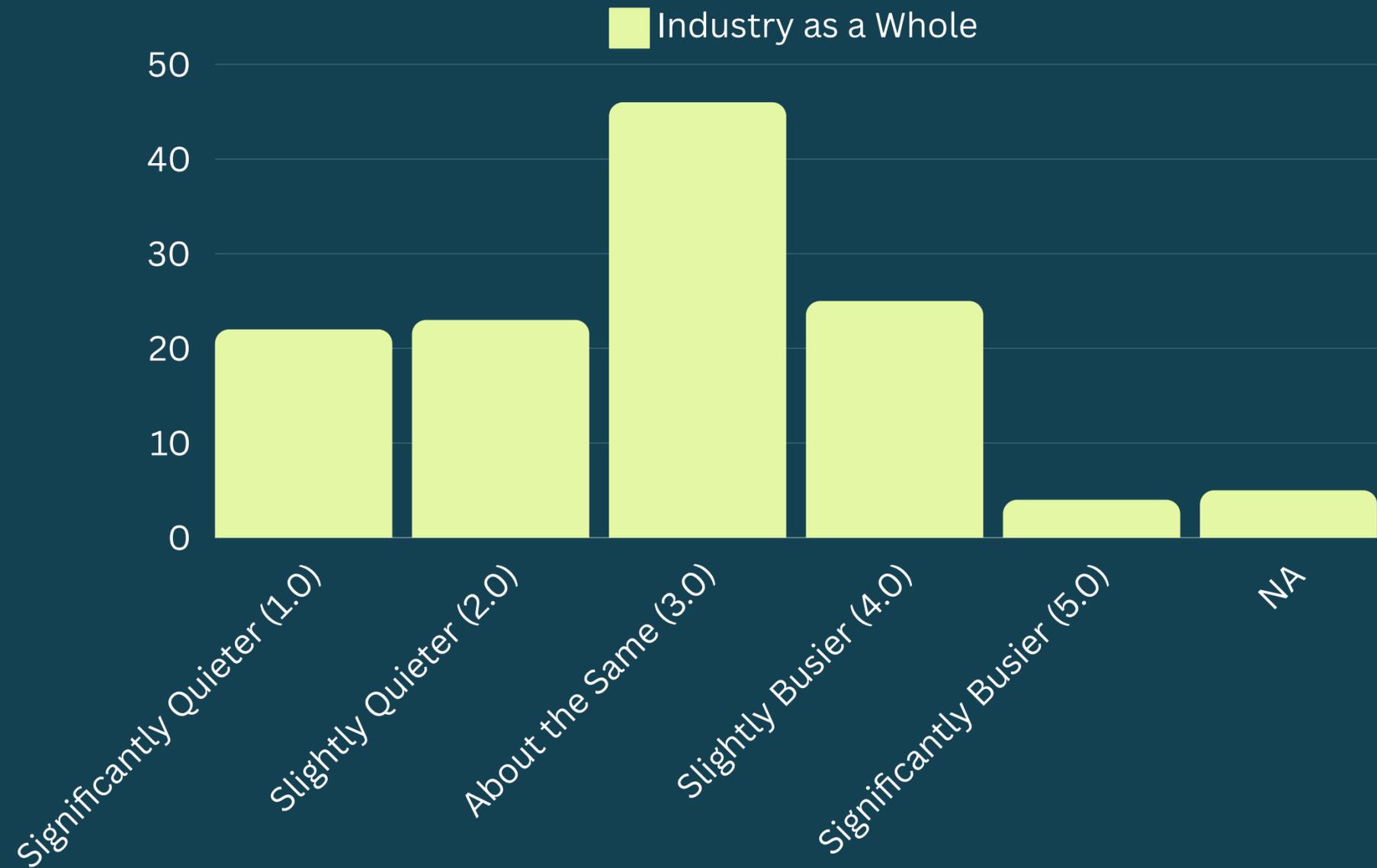
FORECASTING



2023 V 2024

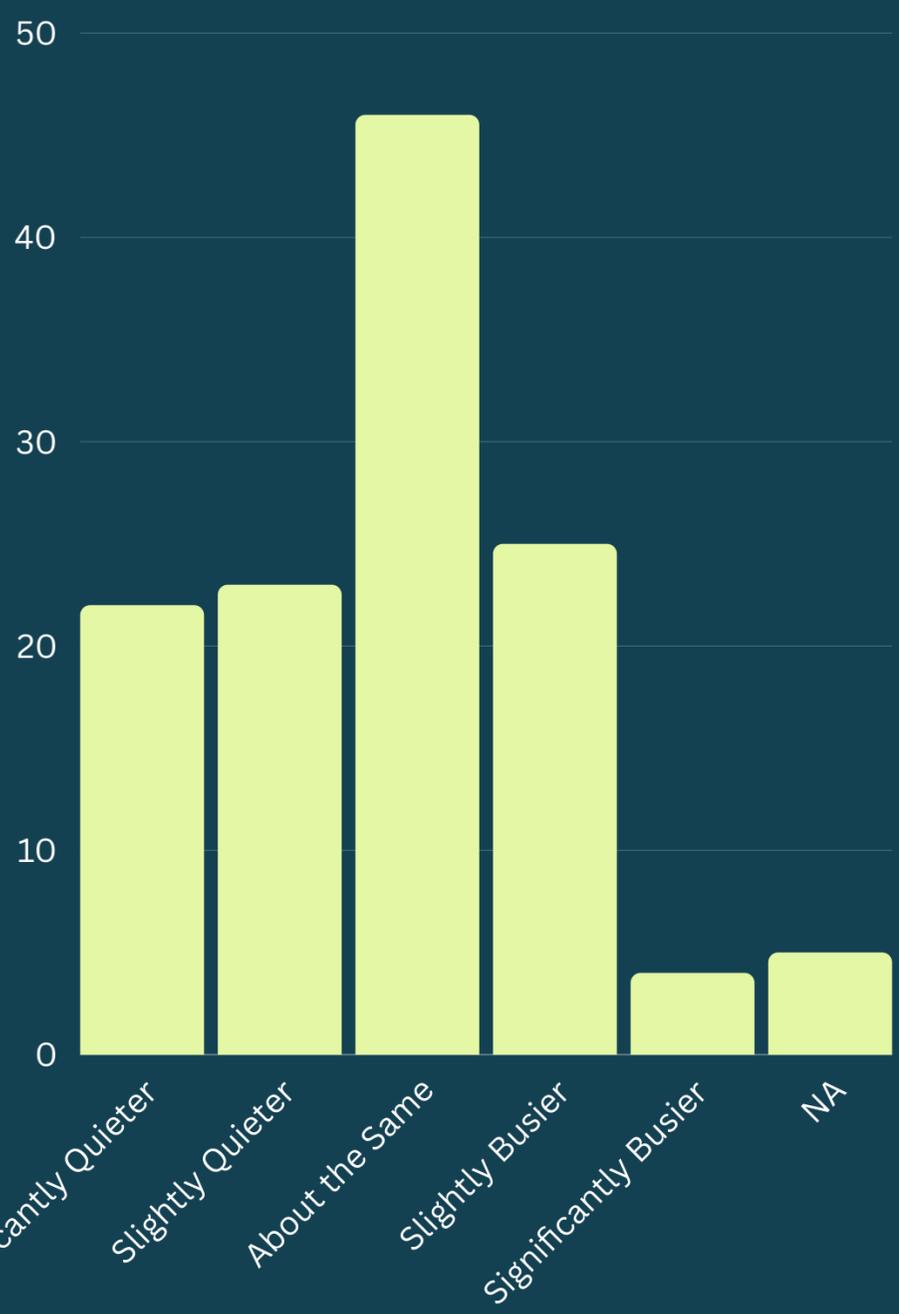
How do you feel about this year's customer numbers compared to last year?

125 Responses - Average Score 2.7



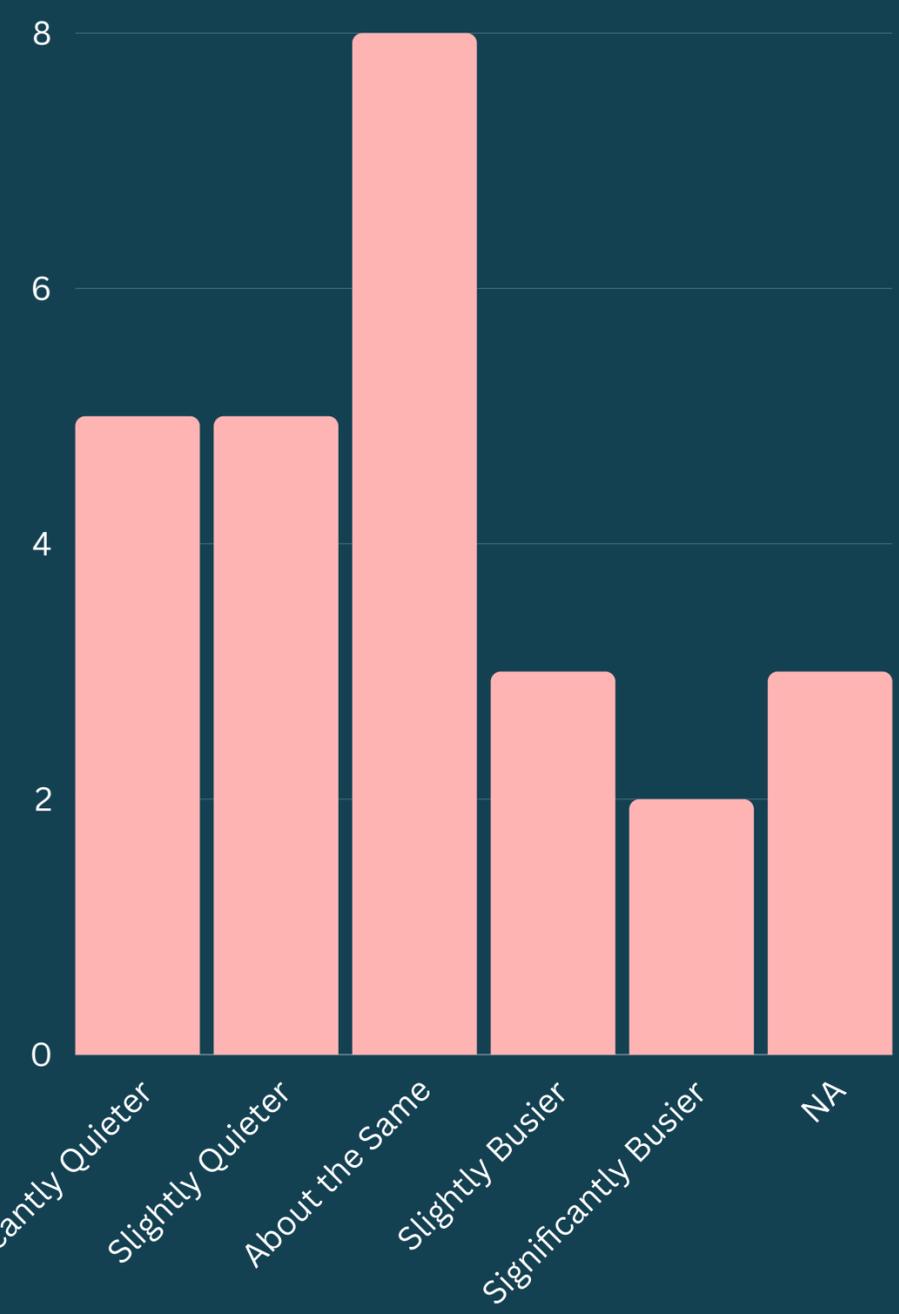
2023 V 2024: HOW DO YOU FEEL ABOUT THIS YEAR'S CUSTOMER NUMBERS COMPARED TO LAST YEAR?

Industry as a Whole - 125 Responses



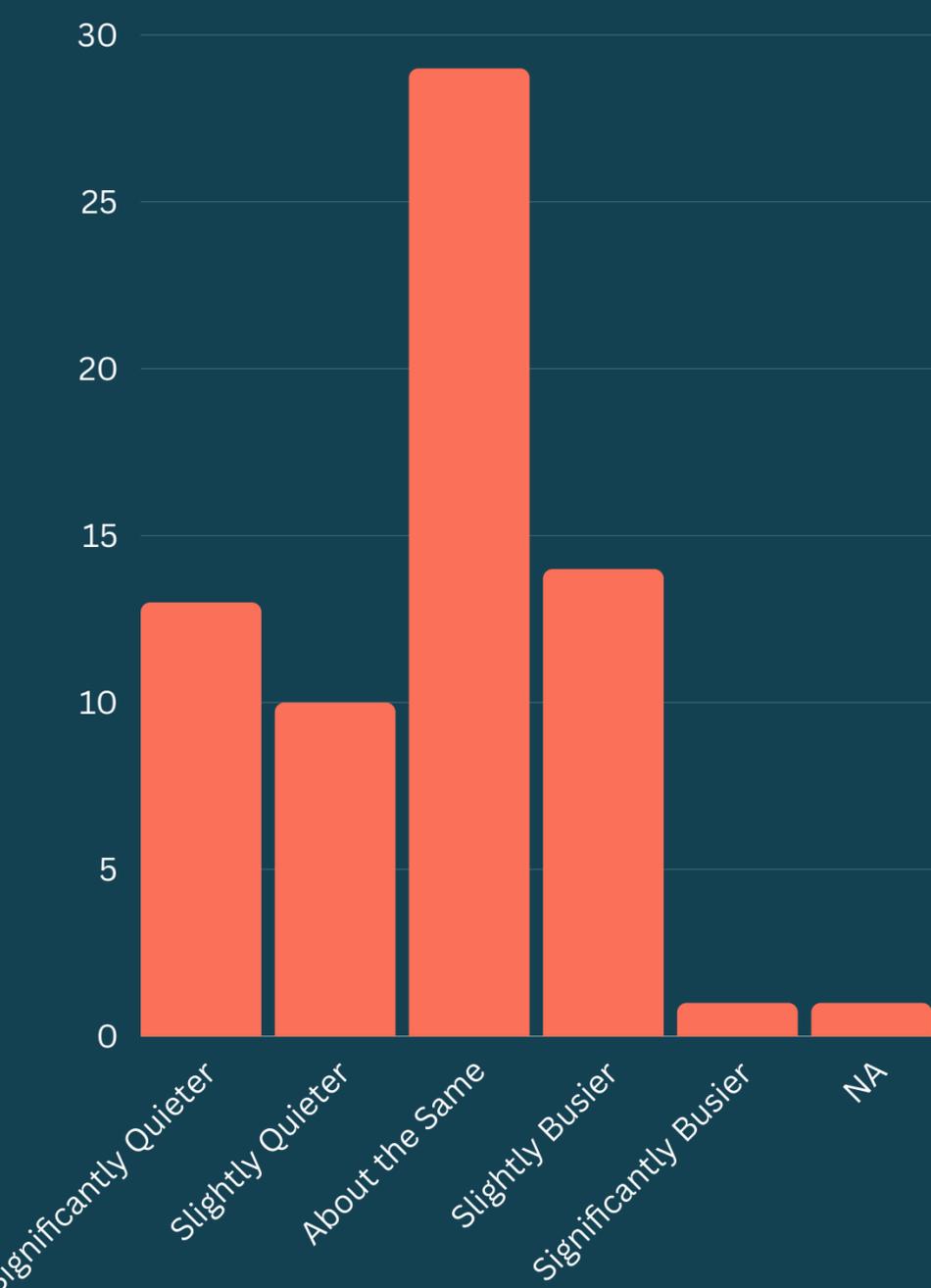
Av Score: 2.7

Activities & Attractions Only - 26 Responses



Av Score: 2.2

Accommodation Providers Only - 69 Responses



Av Score: 2.7

2023 V 2024: Reasons for Stronger Performances

- Increased number of business visitors
- Improved marketing and online presence
- Distribution through OTA's including review websites
- Customer loyalty
- Working with new niche interest groups and the cruise markets

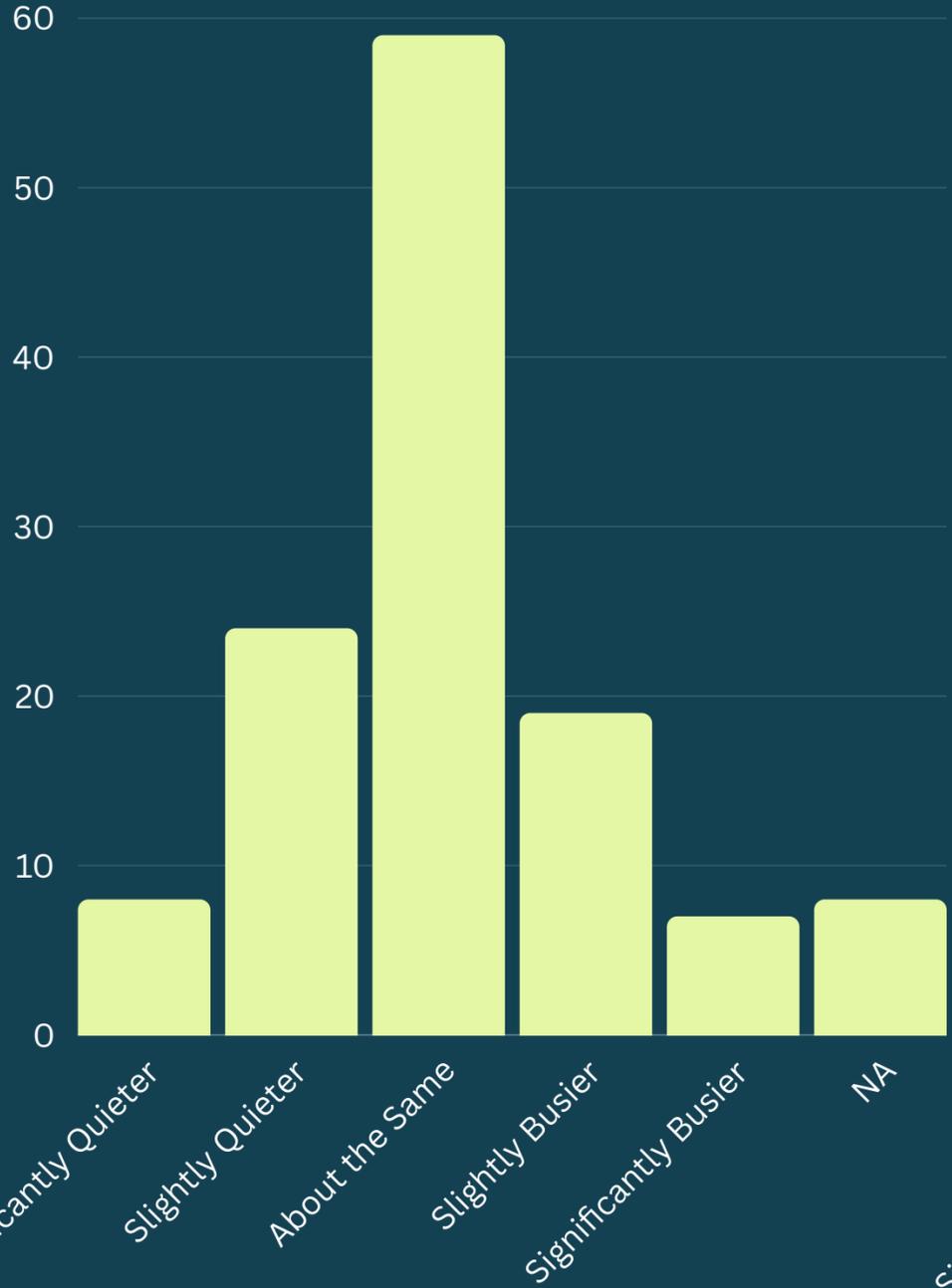
2023 V 2024: Reasons for Quieter Performances

- High travel costs to the Island
- Unreliable transport links to the Island
- Weather conditions affecting outdoor activities and attractions
- Cost of living, inflation and spending habits
- Event scheduling disruption
- Lack of open indoor activities and attractions in the shoulder season



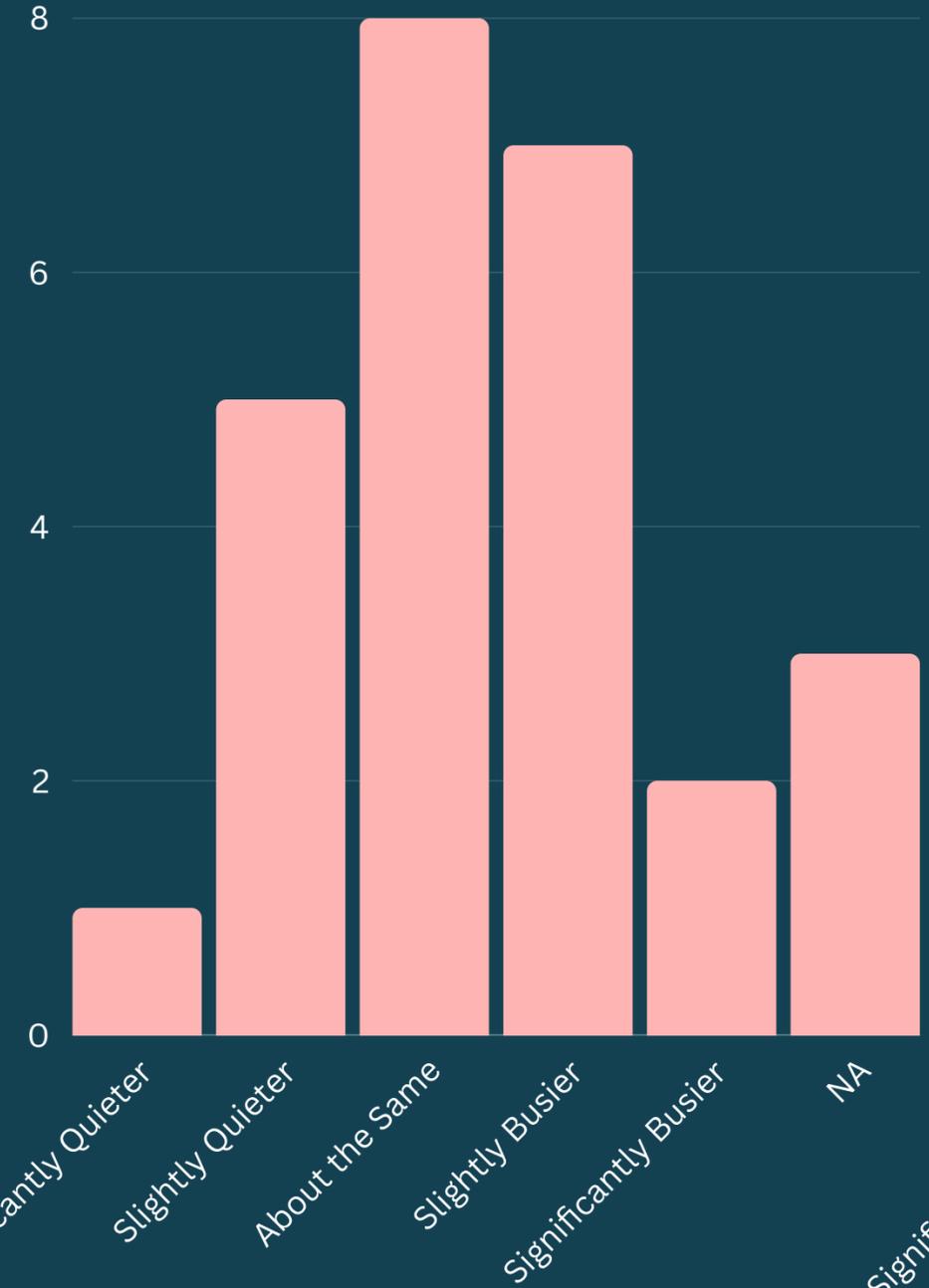
2024 V 2025: HOW DO YOU FEEL NEXT YEARS CUSTOMER NUMBERS WILL COMPARE TO THIS YEAR?

Industry as a Whole - 125 Responses



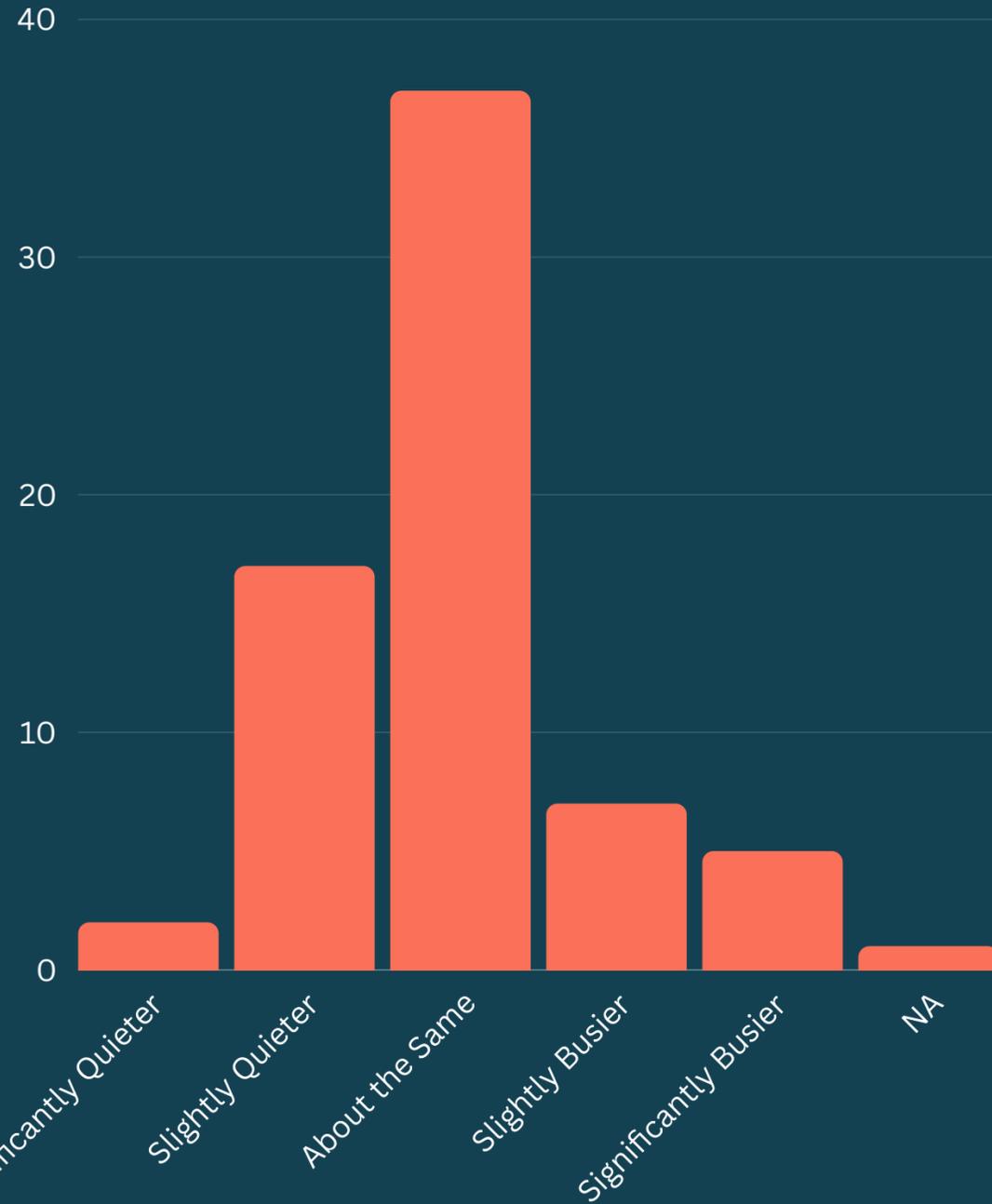
Av Score: 2.9

Activities & Attractions Only - 26 Responses



Av Score: 3.2

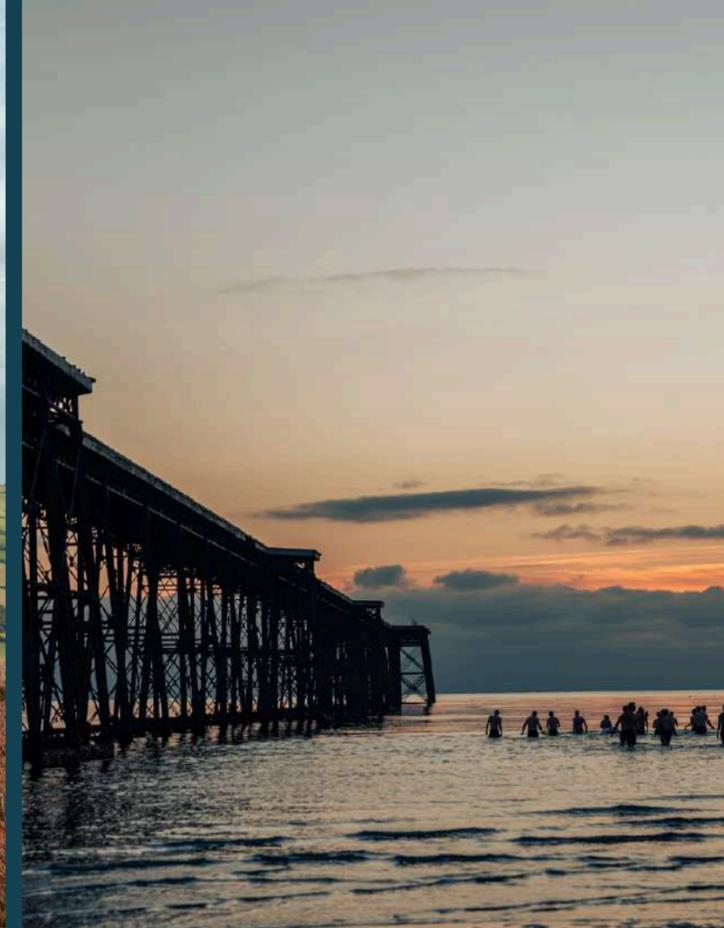
Accommodation Providers Only - 69 Responses



Av Score: 2.9

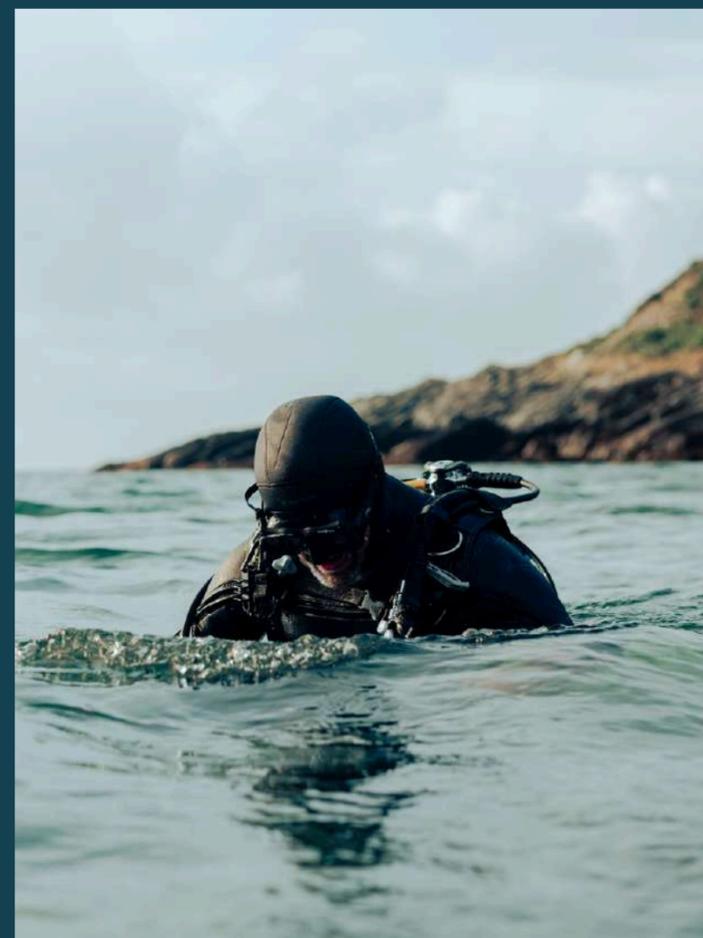
Key Drivers for Projected Growth in 2025 vs. 2024:

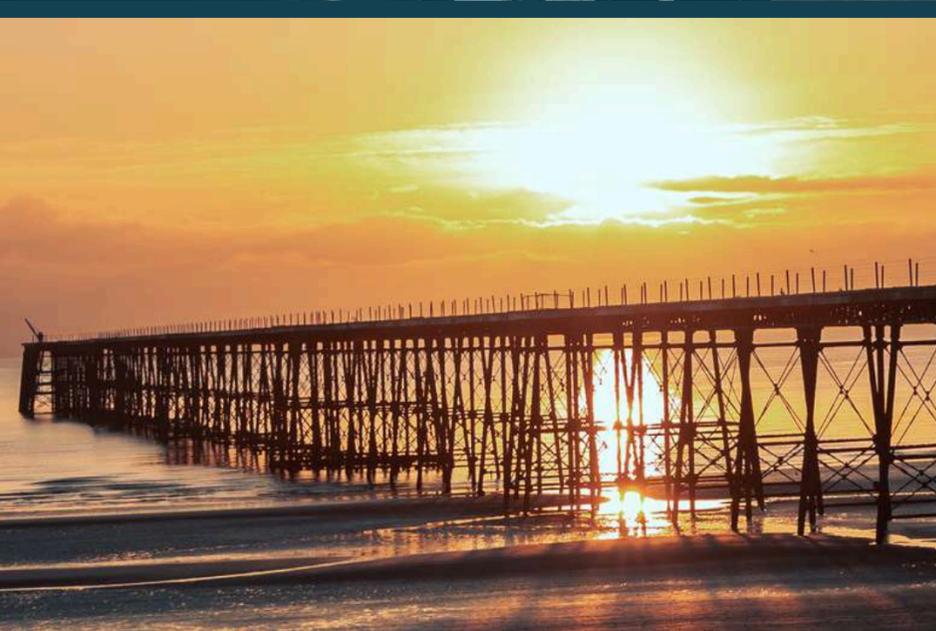
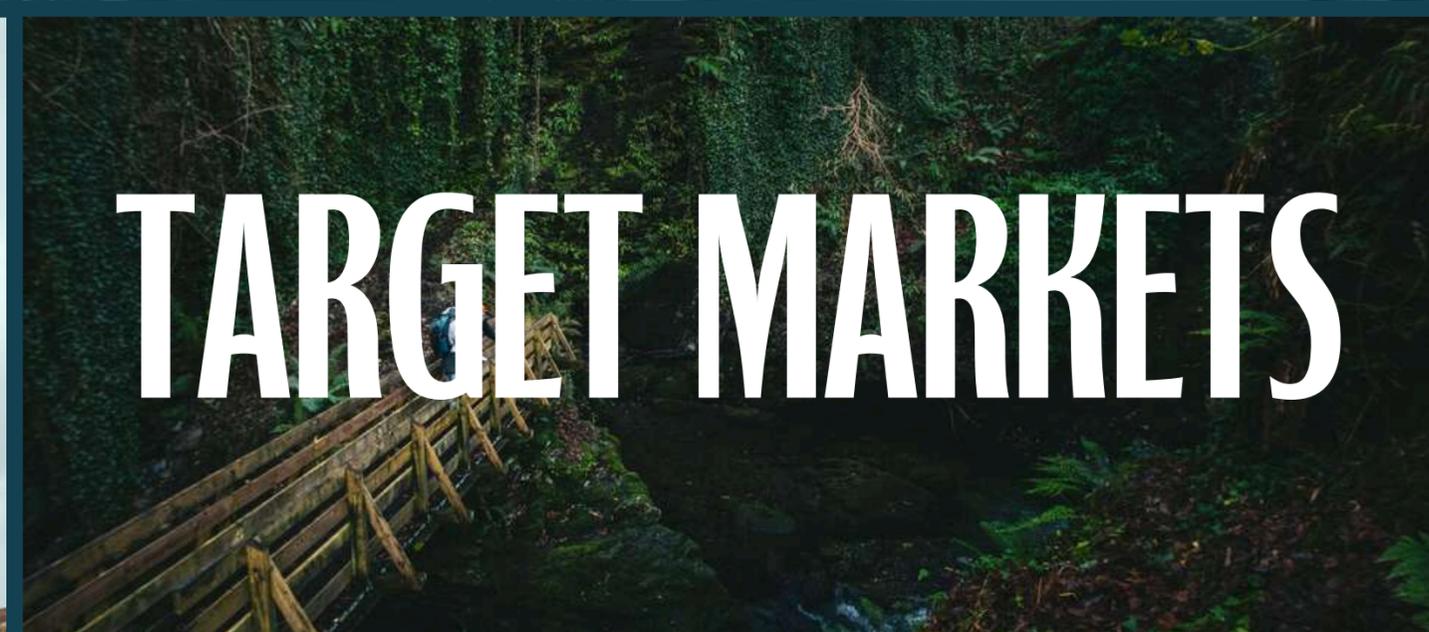
- Increase in marketing investments by some businesses
- Expansion of product portfolios by some businesses
- A more positive outlook on better weather conditions



2024 V 2025: Reasons for Forecasted Decline

- Uncertainty regarding **travel and transport links** to the Isle of Man
- Concern over the number of tourists visiting in the **shoulder season** months
- Some businesses (mainly self-catering businesses) **changes in event scheduling** will bring fewer tourists in the future.



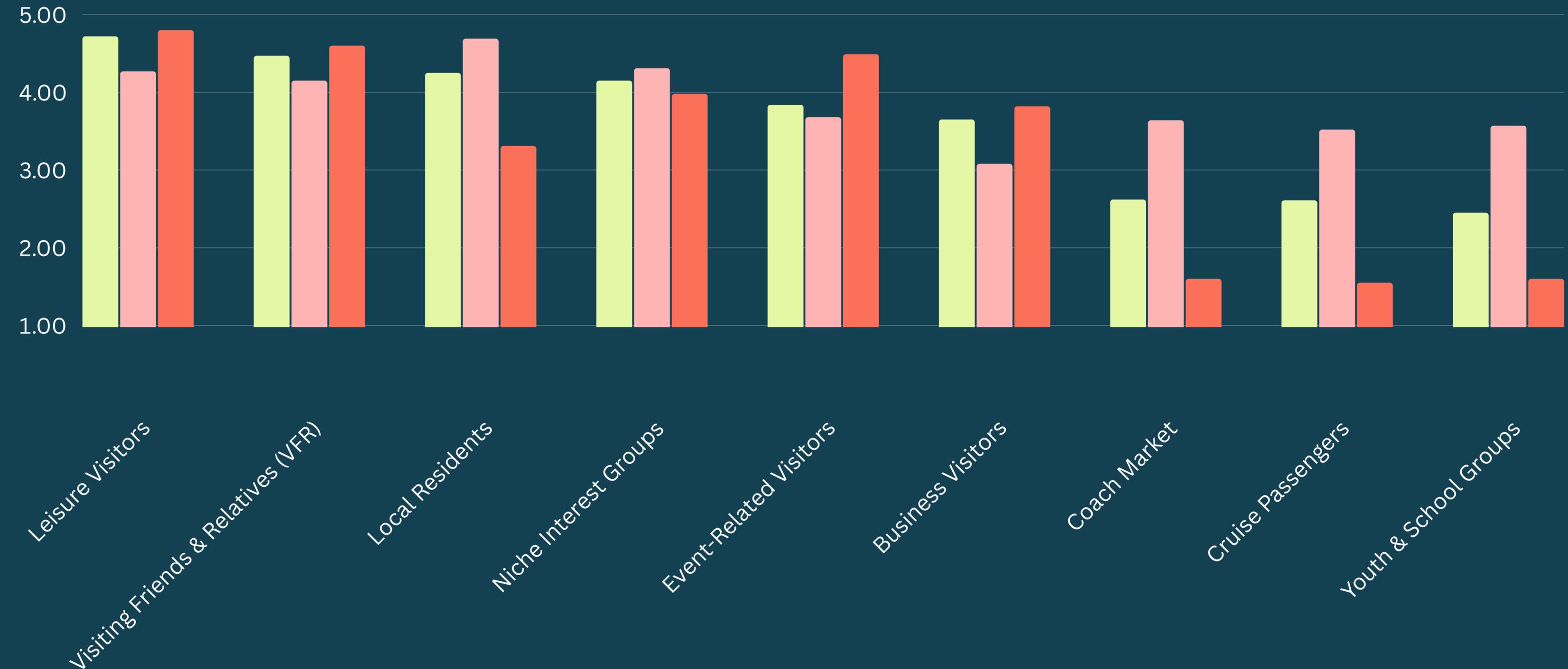


WHICH MARKETS DOES THE ISLAND TOURISM INDUSTRY CURRENTLY WORK WITH?



HOW DOES INDUSTRY VALUE SPECIFIC TARGET MARKETS?

Industry as a Whole (127 Responses) Activities & Attractions Only (27 Responses)
Accommodation Providers Only (70 Responses)





I FEEL CONFIDENT MARKETING MY BUSINESS TO OFF-ISLAND AUDIENCES...



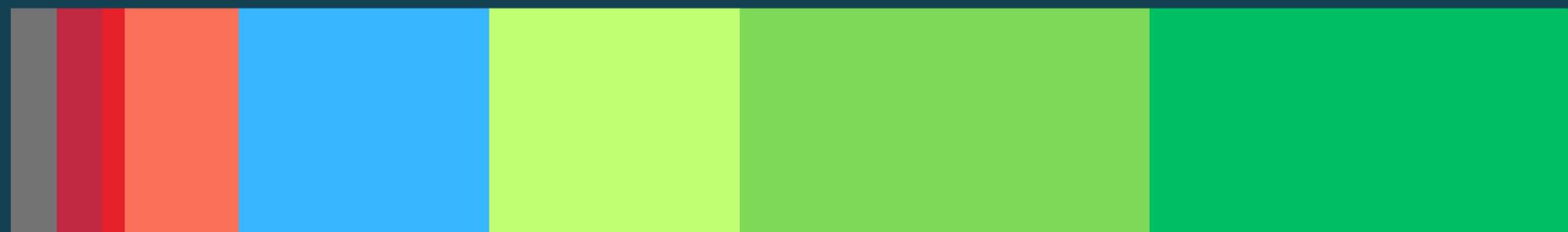
Industry as a Whole



Activities & Attractions Only



Accommodation Providers Only



0%

20%

40%

60%

80%

100%

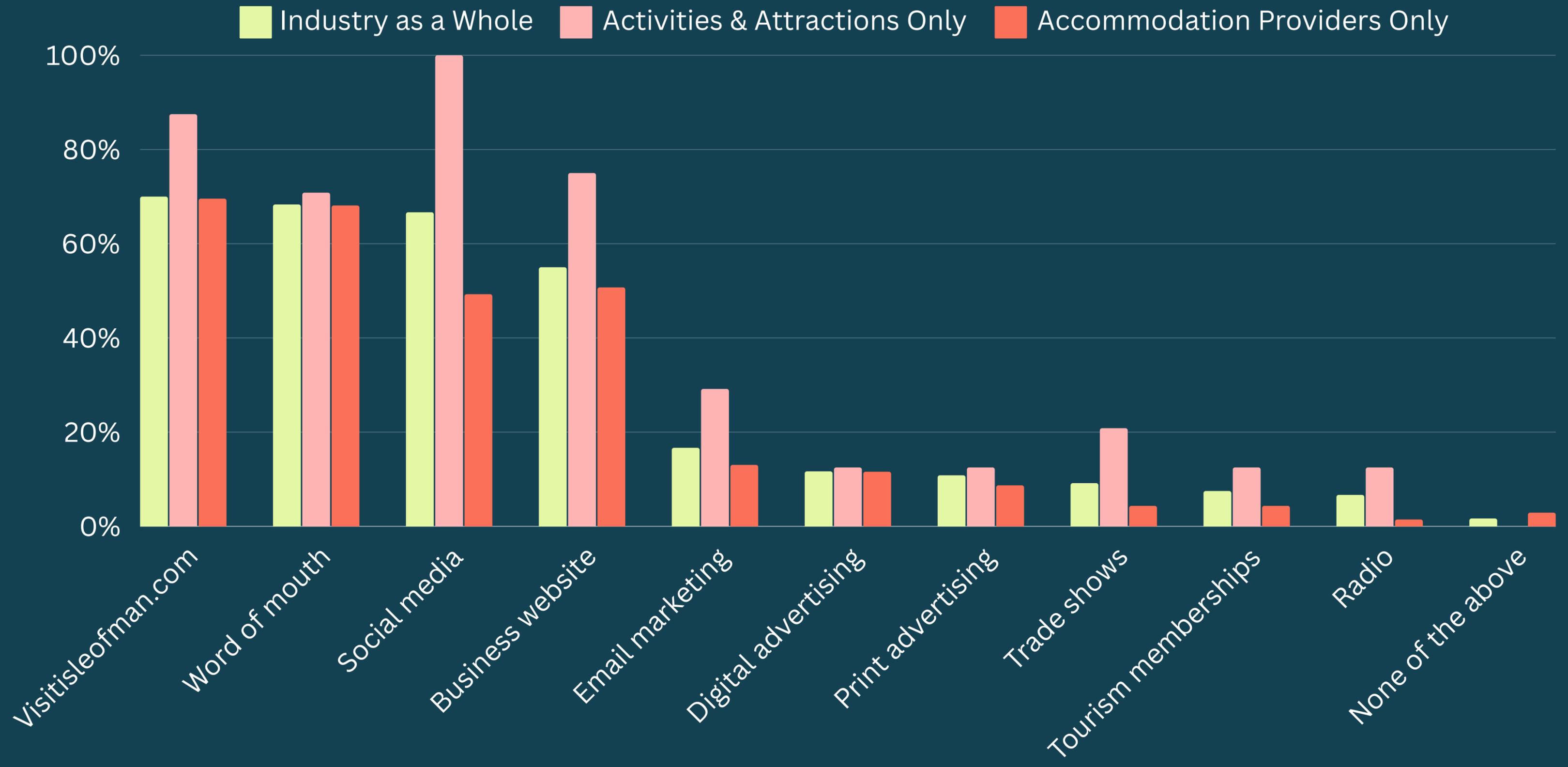
120%

How confident do you feel that your marketing activity is converting into bookings on a scale of 1 to 10?



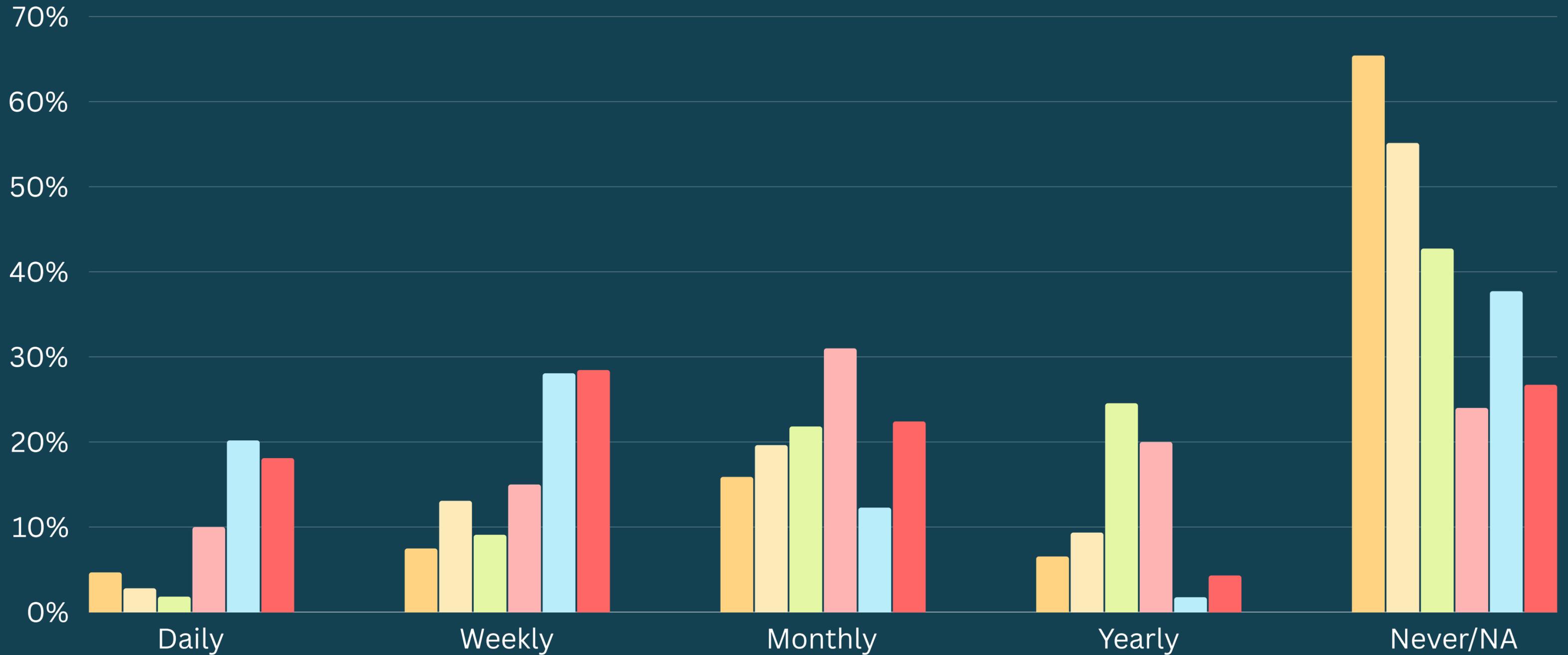
INDUSTRY AVERAGE

WHAT ARE SOME WAYS YOU'RE HOPING OFF-ISLAND AUDIENCES MIGHT FIND OUT ABOUT YOUR BUSINESS?



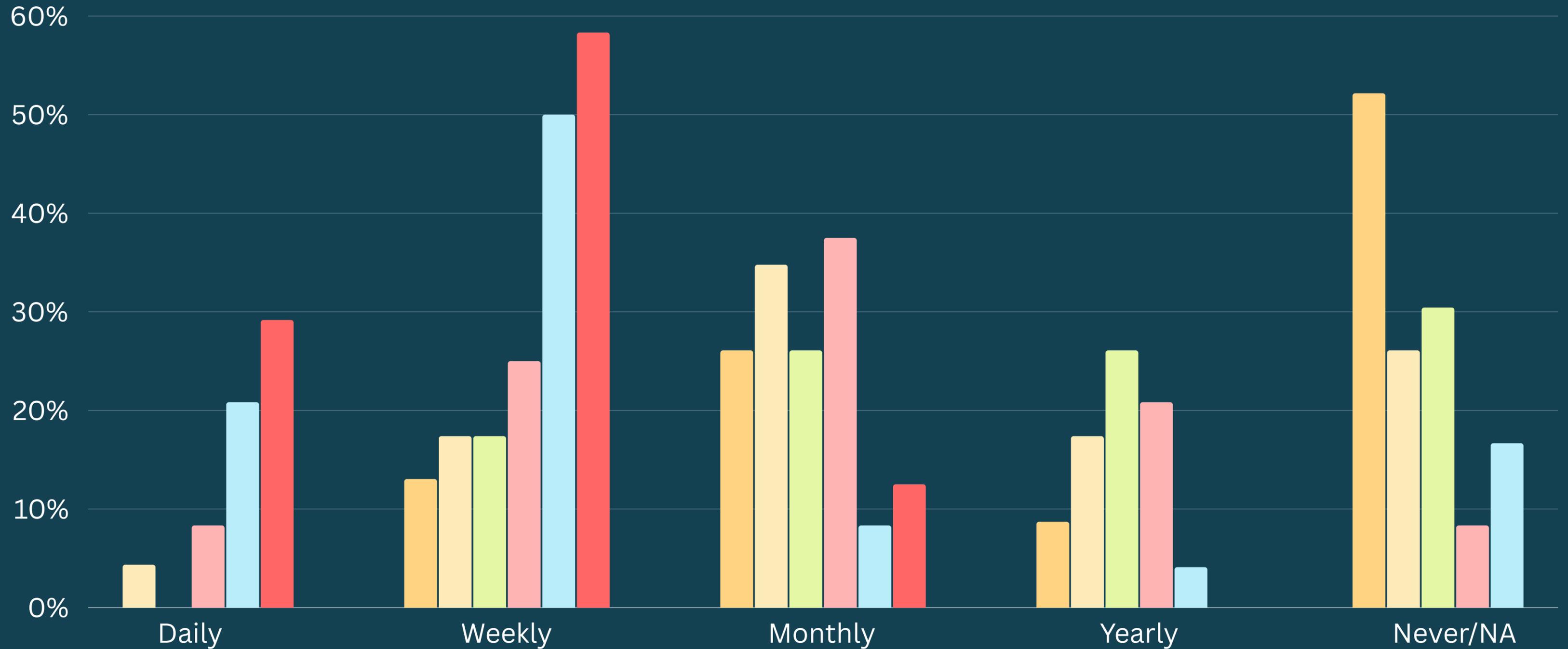
HOW REGULARLY DOES INDUSTRY AS A WHOLE..

■ Email Customer Databases ■ Publish Blogs and News Stories ■ Update your Google Business Listing
■ Update your Business Website ■ Respond to Online Reviews ■ Post on Social Media

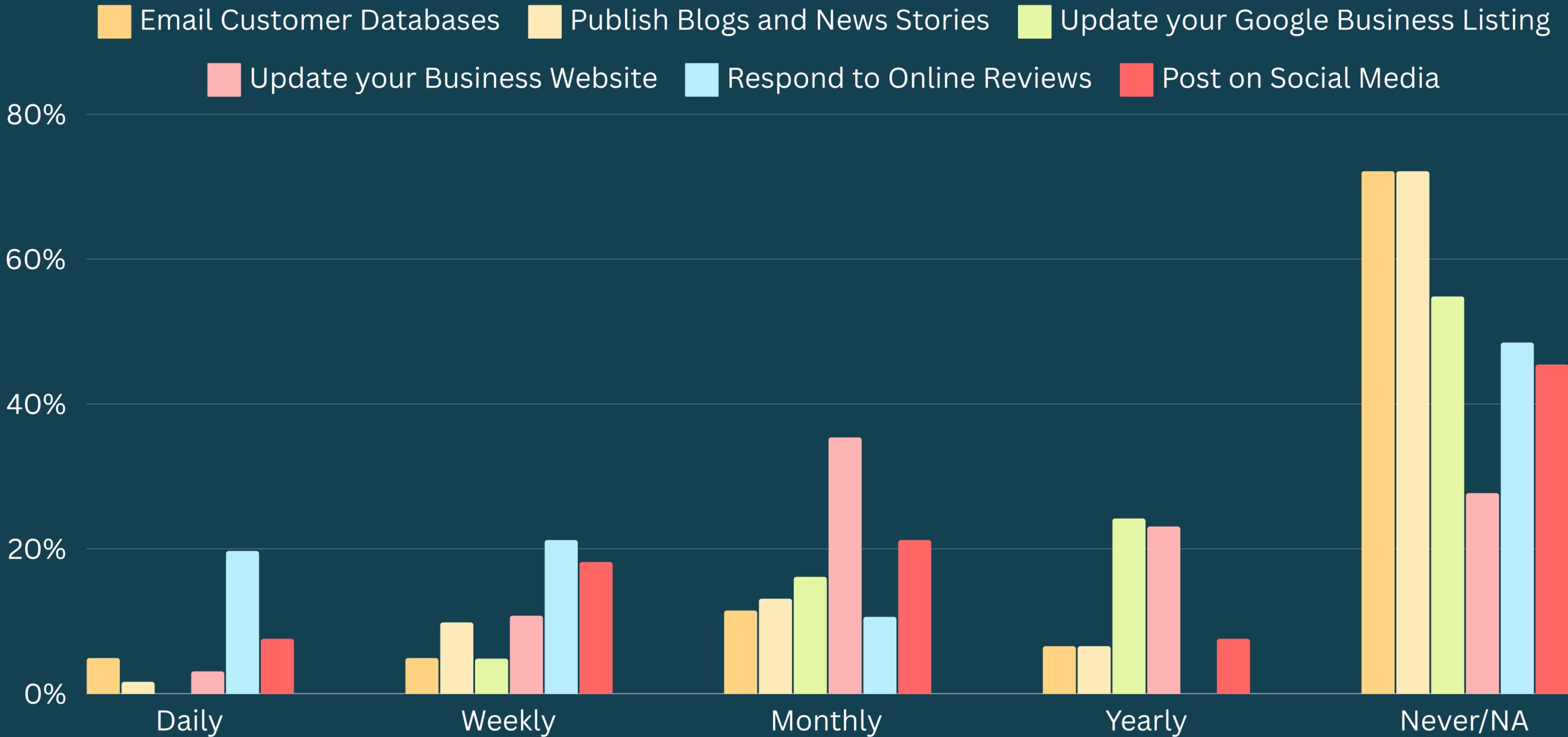


HOW REGULARLY DO ACTIVITY & ATTRACTION BUSINESSES.. (24 RESPONSES)

■ Email Customer Databases ■ Publish Blogs and News Stories ■ Update Your Google Business Listing
■ Update Your Business Website ■ Respond to Online Reviews ■ Post on Social Media



HOW REGULARLY DO ACCOMMODATION BUSINESSES... (67 RESPONSES)



MARKETING CHALLENGES



Funding, Resource & Time Challenges.



Activities and attractions have reported challenges in generating engagement with cruise passengers.



Over-reliance on social media for marketing. There is a desire to diversify.



Strong desire to extend the season, but limited knowledge or resources to do so.



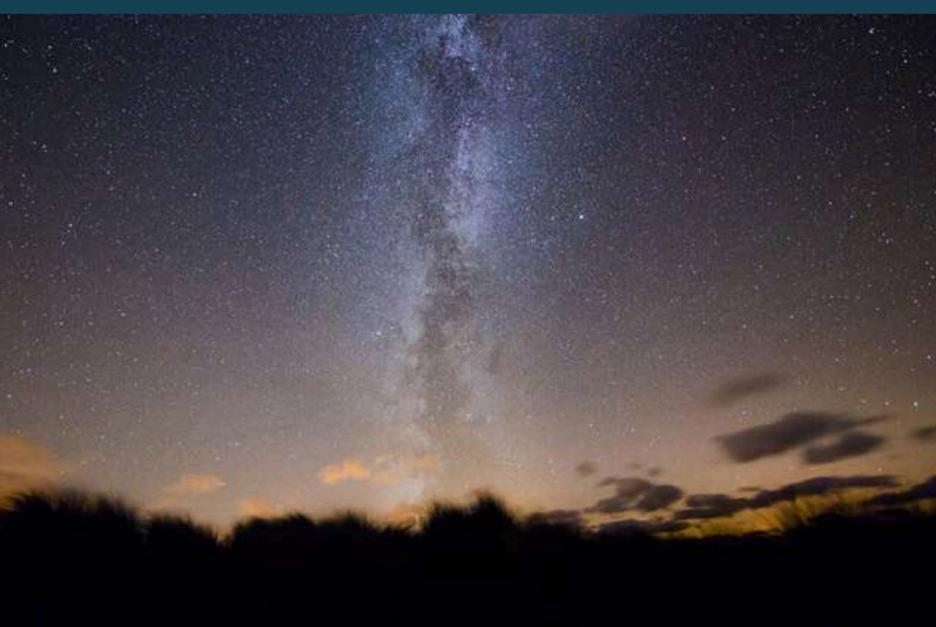
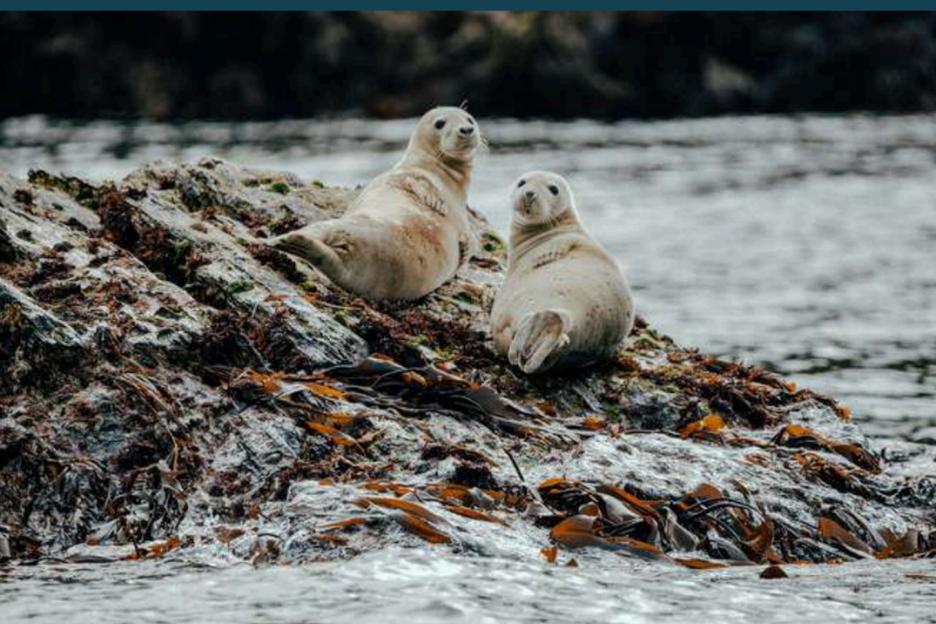
Lack of early ferry schedules makes it hard to create package deals or target events



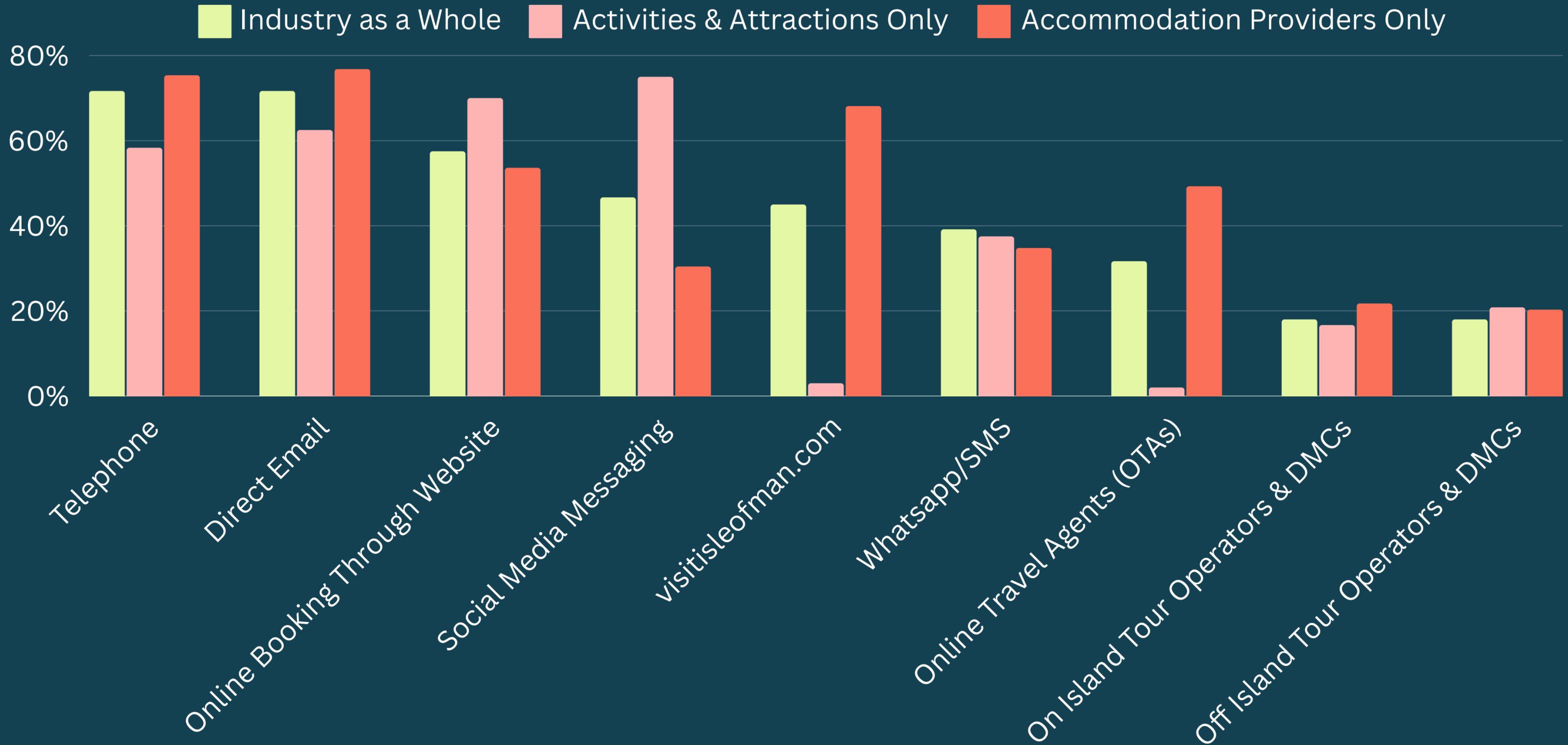
Difficulty sourcing suitable online booking systems & payment providers



Lack of confidence and feeling overwhelmed



HOW CAN VISITORS MAKE A BOOKING WITH YOUR BUSINESS?





SHOULDER SEASON SESSIONS

69% expressed interest in accessing/attending training sessions. Of whom:

67% would be open to attending in person.

54% would be open to being able to watch a recorded version.

35% would be open to streaming it live online (via Teams).

Which Days are Most Suitable

Tuesday: 72%

Thursday: 66%

Wednesday: 63%

Monday: 59%

Friday: 37%

Saturday: 25%

Sunday: 18%

What Time is Most Suitable

11am – 2pm: 58%

2pm – 5pm: 51%

5pm – 9pm: 40%

8am – 11am: 32%



WHICH OF THE FOLLOWING PROPOSED SESSIONS WOULD YOU AND/OR A REPRESENTATIVE FROM YOUR BUSINESS BE INTERESTED IN ATTENDING? 115 RESPONSES (INDUSTRY AS A WHOLE)



WOULD YOU BE INTERESTED IN AN ONLINE TRAINING PROGRAMME TO REFRESH YOUR KNOWLEDGE OF THE ISLAND AND WHAT IT HAS TO OFFER VISITORS? (INDUSTRY AS A WHOLE)

