

PRODUCT AUDIT REPORT SUMMARY



BACKGROUND TO THE REPORT

In September 2020, Visit Isle of Man commissioned external research agency, Blue Sail, to identify the potential for visitor-related product development on the Isle of Man in the context of what attractions and activities already exist on the Island. They explored market trends in a pre and post-Covid environment and what comparator destinations are doing to achieve success and target similar key markets. This document provides an overview of the findings, highlights the opportunities for development and recommendations for phased development and investment.

RESEARCH OBJECTIVES

- To carry out an audit of the current attraction and activity products and identify recommendations and actions for how the Island can develop its product offering.
- Assess each product to determine the viability of each to attract visitors, both as the main purpose of travel, or as an enhancement to their visit to the Isle of Man.
- Identify growth opportunities for the Isle of Man, with reference to other destinations that offer the Isle of Man's current products to their visitors, providing footfall figures and how these have been achieved.
- Determine the opportunities for each product to grow visitor numbers.
- Identify gaps in the Isle of Man's current offer, based on research of the local product and comparison with UK destination competitors.
- Identify any changes in consumer behaviour due to the current Covid-19 pandemic and how this may impact product development on the Isle of Man.

11 PRODUCT AREAS COVERED

- Heritage and Culture
- Biosphere
- Marine and Nature
- Walking
- Cycling
- Golf
- Active and Adventure
- Specialist Groups
- Health and Wellbeing
- Food and Drink
- Motorsport Heritage

Please note this document is summary information taken from an independent research report and interpreted by Visit Isle of Man for the benefit of the Island's tourism industry. The full report can be made available on request.

PRODUCT AUDIT - ANALYSIS

AUDIT ANALYSIS - KEY FINDINGS

PLENTIFUL PRODUCT

- The Isle of Man has plenty of products - with over 160 activities and attractions split across eleven different areas, there are plenty of products and a variety of things to see and do for a small island that attracts approximately 300,000 visitors per year.

OUTSTANDING NATURAL ENVIRONMENT

- Visitors value the natural environment of the island – they like the rural settings of the attractions and activities and that, once on the island, these activities are easy to access with short travel distances between them. The variety of landscapes on a small island, the coastline, vistas and views out to sea are all strengths.

DIPS IN QUALITY OF EXPERIENCES

- But visitor expectations are not always met when they get to the island - the visitor feedback for most products is generally relatively good but there are some dips in the quality of experiences, typically around customer service, facilities and lack of participatory activities.

NO BIG TICKET ATTRACTION

- No product on the island can attract visitors in significant numbers in its own right - there are no particular stand out attractions in any of the product areas, no critical mass

THIS TELLS US THERE IS;

- **Strength in the Isle of Man as a destination having lots of different experiences in close proximity to each other but a compelling need to prioritise product areas by their growth potential**
- **Merit in looking at experiences, which use and package the island's product strengths and moving towards grouping products in ways that make sense to the visitor and create memorable experiences.**

MARKET ANALYSIS & TRENDS

VISIT ISLE OF MAN TARGET MARKETS

The majority of the Isle of Man's 300,000 visitors are 'Traditional Travellers', typically motivated to travel by the appeal of traditional heritage and cultural experiences. A third of all the island's visitors are visiting friends and relatives (VFR) and visitors travelling in groups have traditionally been an important part of the Isle of Man's visitor base.

It is important that any investments in product development improve the quality of experience for these visitors, and encourage higher spend and longer stays.

Curious Explorers and Experience Seekers are identified as the two growth market segments, who are visiting the island in smaller numbers but their travel behaviours are more aligned to current and future tourism mega drivers and consumer trends.

PRE-COVID19 TRAVELLERS WERE LOOKING FOR:

- **Authenticity** – the pursuit of the real, collecting experiences to be shared
- **Connection with nature** and environmental sustainability
- **Learning and personal growth** as an antidote to always 'being on'
- **Sophisticated technology** – hyper-connectivity before, during and after a trip
- **Opportunities to travel alone** – the growth of the solo traveller

The Covid-19 pandemic has only accelerated these trends.

Research shows that people are increasingly looking for opportunities to spend time outdoors, being close to nature and with plenty of space in preference to mass tourism sight-seeing.

PRODUCT AUDIT - THE OPPORTUNITY

HEADLINES

The Island has a significant opportunity to respond to tourism and post-Covid trends and to develop the visitor products in such a way that attracts a wide market, introduces new visitors to the island, extends the season, extends stays and increases visitor spend.

The main opportunities for developing the visitor product therefore lie in outdoor activity areas. Collectively, they form a compelling offer which take place in the island's outstanding natural environment, a key asset which has been declared and internationally recognised as an Island Biosphere.

But there is a change in focus needed to capitalise on this opportunity. The island's tourism infrastructure needs to **align with contemporary visitor expectations of experiences, quality and service**. Businesses need to be brought together and given the opportunity to be a central part of the journey; and **the market positioning of the Isle of Man needs to change** to reflect the **variety of experiences on offer** in such a special and internationally significant natural environment.

In addition to these growth areas, it is still important that the Isle of Man maintains the quality of visitor experiences in those areas that have served it so well, namely Heritage and Culture, Golf and Motorsport Heritage. These product areas will continue to attract existing markets and so incremental investment will still be required.

There are some stand out features which have the most potential for growth. These are the elements where future development should be focused to capitalise on changing consumer trends.

PRODUCT DEVELOPMENT OPPORTUNITIES



MARINE & NATURE

- Developing more visitor experiences that appeal to a general interest market, rather than on specialist activities. More creative ways to engage visitors with the flora and fauna of the island should be sought. This could include creating new foraging trips or adding more boat trips which offer opportunities to watch the whales, dolphins and birdlife.



WALKING

- There is already a wide range of mapped routes on the island which appeal to multiple markets. The emphasis here is not necessarily about creating more routes but curating those existing routes to create a range of visitor experiences for the different target markets.



CYCLING

- Like Walking there are a number of existing routes that appeal to cycling enthusiasts and a diversity of on and off-road options but again, there is an opportunity to curate cycling experiences for the different target markets and to give people ideas about how best to explore the island further. In the longer-term, and as the demand grows, there is a need to improve and invest in infrastructure on the island.



ACTIVE & ADVENTURE


- Opportunities for development in this area are to maximise the qualities of the Isle of Man as an island, offering more experiences that showcase its outstanding natural environment from different perspectives and at different times of the day e.g. dawn sea kayaking and night coastering.



HERITAGE AND CULTURE, GOLF & MOTORSPORT HERITAGE



- Incremental developments in these areas to add value, refresh and increase the variety of the offer in these product areas to bring it in line with other contemporary visitor experiences. Example developments might include improvements to attraction infrastructure or introducing of new curated experiences like themed trails or itineraries.

PRODUCT AUDIT - SUMMARY OF RECOMMENDATIONS

Below are the key 4 recommendations of the Product Audit for Visit Isle of Man in partnership with stakeholders and tourism businesses. It is recommended that these be implemented in the next 18 months and also include quick wins, which are marked with a 

EXPERIENCE DEVELOPMENT

The partners on the Isle of Man should work together to combine their product assets creating engaging and memorable visitor experiences. Experiences should be designed to create more visitor choice, developed by businesses across all aspects of tourism and related sectors, and then communicated to visitors in ways that are persuasive and easy to understand.


-  Develop themed walking and cycling trails and driving routes covering coastal and countryside areas, which can be enjoyed across all seasons, featuring eateries, attractions and accommodation.
-  Develop natural environment experiences and packages that extend the day and the season e.g. night skies, dawn and dusk activities.

Assess the potential of hosting a festival celebrating the great outdoors.

Identify the scope of the Isle of Man's inclusion in British and European specialist wildlife and natural environment cruise tours.

BUSINESS INFRASTRUCTURE


The industry should rise to the opportunity presented for the visitor economy by the natural environment and the Biosphere.

-  Develop and launch a 'Sense of Place Toolkit' for tourism businesses, covering commercial and marketing opportunities to actively promote the Isle of Man's natural environment.
- Review financial support schemes to establish and promote a new 'Tourism Business Investment Fund'.

TOURISM INFRASTRUCTURE




The growth of tourism requires big infrastructure to be in place to facilitate it.

Identify large sites suitable for new visitor accommodation and encourage small scale expansion that are appropriate and sensitive to the natural environment and can become part of the visitor experience.

-  Promote the opportunities of investing in provision of facilities for walkers, cyclists and other outdoor visitors through online information and business advice, signposting to funding and support schemes.

MARKETING AND PROMOTION

Marketing and promotional activity will need to be developed hand in hand with the other areas of recommendation to ensure that the island's overall proposition and experiences on offer are clearly communicated to prospective visitors.

-  Develop clear and compelling messaging that positions the Island as a Biosphere and make the concept meaningful to prospective visitors.
 -  Commission a photographer to produce a library of quality images of the natural environment including visitors interacting with it, that will be available for Trade to utilise in their own marketing.
- Organise and launch a business roadshow in 2021 to promote online booking software.
-  Review the navigation of the Visit Isle of Man website to streamline the visitor journey.
- Improving the visitor arrival (and exit) points to reflect the Island's outstanding natural environment.